

Acknowledgements

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Table of Contents

Introduction	3
User’s Guide to Holistic Management® Decision Cases (HMDC)	3
A Step by Step Guide to Writing a HMDC	5
Additional Web-based Resource Materials	7
Decision Case #1	
Do We Worm?—Nature Lands Sheep Dairy	8
John Gerber	
Decision Case #2	
To Add Cows or Not to Add Cows—Sulco Farm	17
Seth Wilner	
Decision Case #3	
How Much Diversity is Sustainable?—Green Hills Farm	33
Karl North	
Decision Case #4	
Agricultural Conservation Easement Offer— The Spradley Farm	44
John Thurgood	
Decision Case #5	
“When the Back Goes”—KTS Farm	55
Jim Weaver	
Decision Case #6	
The Farm in Transition—Malven Hill Farm	64
Karl North	
Decision Case #7	
Steering the Farm—Joe & Sandra Hendricks	74
Margaret Smith	
Decision Case #8	
Stressed Out!—Bree	87
Decision Case #9	
Purchase of a Home-Heating System—Windy Ridge Farm	94
Steve Ritz	
Appendix (Holistic Management® Testing Questions)	105

Introduction

User's Guide to Holistic Management® Decision Cases

By John Gerber

Why teach with Holistic Management® Decision Cases?

Holistic Management® Decision Cases are useful to introduce new learners to holistic decision-making or to help more experienced learners improve their practice. They are particularly useful when used as part of a *Whole Farm Planning* process. In addition to helping to teach Holistic Management, these decision cases may be useful to help learners improve their judgment, change attitudes about difficult issues, acquire synthesis skills, or enhance their problem solving skills. Decision Cases are generally not very useful as a means of teaching facts or technical knowledge. Some knowledge of the context of the situation in which the decision is made is needed in order for the case to be useful. These Decision Cases also require an investment of time by the participant-learners and assume at least a minimum level of motivation.

Teaching with Holistic Management® Decision Cases is an “art” and will be most successful if the teacher has a good understanding of Holistic Management. The teacher is more of a facilitator than a typical “instructor,” and an effective process is more important to learning than the final decision. Both the story of the Decision Case and the facilitator must be as authentic as possible to fully engage the participant-learners. Interaction between the facilitator and participants and among participants is valuable and adds to the learning environment. As a facilitator, you should always have a plan, but “be ready to dance” as the conversation may take unexpected yet meaningful turns. It may be possible (and useful) to guide the learning with good questions, but it is not always helpful to control the flow of the conversation and learning. It is critical that the facilitator knows not only what problem (or opportunity) the decision is meant to address, but also the context in which the decision is being made.

What makes a good Holistic Management® Decision Case?

A good Holistic Management® Decision Case should include:

- A decision maker(s) and a specific problem or dilemma that requires a holistic goal to address
- Related issues that necessitate the use of the Holistic Management® testing questions
- Possible alternative solutions
- A whole under management, holistic goal, and information to allow users to develop a list of indicators to monitor

A good Holistic Management® Decision Case may include:

- An opportunity to practice using the Holistic Management® testing questions
- An opportunity to practice diagnosing problems
- An opportunity to identify the root cause of a problem

Introduction

A good Holistic Management® Decision Case is developed to identify the practical components of the Holistic Management® framework and demonstrate the value and impact of holistic decision-making. It is important you know your audience for the case, have outlined specific learning objectives, written the case, and tested the case with this in mind. A good case will create a learning environment in which participants will “yearn” to learn more about Holistic Management.

A good Decision Case tells a story. A good story will allow participant-learners to “get inside” the whole self of the decision maker and view the whole under management and the holistic goal from that perspective. Participants will gain more from the experience of working with a Decision Case if they are fully engaged. While many decision cases use conflict or drama to engage learners, we do not believe these are necessary or even useful. Commitment to the story may be generated in more hopeful, engaging ways as well.

A good Decision Case is set as close to “real time” as possible. Historical or classical cases are interesting but allow the participant to separate themselves (in time) from the decision maker. It is important for the participant-learner to believe the decision case is at least potentially real and relevant.

A good Decision Case creates empathy with the decision maker. The personal attributes of the decision maker will influence the way the decision will be made. Therefore, the learning objectives of the case are more likely to be achieved if the participant-learner can “get inside” of the situation being described and feel in tune with the decision maker as much as possible. This will most likely happen if the Decision Case situation is relevant to the participant. A useful case will be one that the participant is likely to know or face.

A good Decision Case will encourage thought provoking dialogue among diverse participant-learners. Creative solutions are most likely to be discovered by participants when diversity of opinion and background is encouraged. This will also likely enhance engagement and learning.

A good Decision Case for introducing Holistic Management should include a relatively simple decision that generates a discussion of creative solutions. The original decision to be tested should be relatively simple and specific, as complex decisions are not likely to be useful for learning specific objectives. Seemingly simple decisions, however, may generate a discussion of multiple options by applying human creativity to the resource base or seeing beyond single objectives to serving the holistic goal.

A good Decision Case occurs within a complex environment and learning should have the potential to be generalized beyond the specific situation. Cases must be about more than a minor or local issue. General learning of principles, scientific, ethical or otherwise, may often be gleaned from a simple decision.

Introduction

A good Decision Case has options and “expects” a decision will be made. Urgency and seriousness among participants will be enhanced by a decision that seemingly “must” be made. Thus, “no decision” has implications. If the decision involves a paradox or dilemma, creativity and learning may be enhanced. Cases with “obvious” solutions do not promote the same level of learning.

A good Decision Case will help the participant-learner recognize the necessary coherence between the holisticgoal and a good decision. This is particularly important during the development of temporary holisticgoals at which time decision making may help improve the holisticgoal.

A good Decision Case is brief. It will be difficult to sustain the attention or interest of participants if the case is too long. Cases should be just long enough to introduce the facts of the situation, without becoming so boring as to be tedious. An effort should be made to include only necessary facts about the situation in the decision case itself, with only necessary ancillary facts in the attached Exhibits.

A Step By Step Guide To Writing a Holistic Management® Decision Case

- 1. Create an initial idea for a case**
 - a. What are the key elements of the case
 - i. Ecosystem
 - ii. Social
 - iii. Financial
 - iv. Other?
 - b. Identify the key resource persons to inform your Decision Case
 - c. What can the case teach and to whom?
 - i. Identify your audience
 - ii. Identify your learning objectives
- 2. Building the Case**
 - a. Clarify your purpose
 - b. Negotiate the ground rules with case owners/resource persons
 - c. What are the information needs (interview protocol)
 - d. Gather the data
 - i. Background information (relevant literature, maps, Holistic Management materials – whole under management, holisticgoal)
 - ii. Interviews (build trust, listen with respect, patience, inquiring/probing, gather stories and quotes, photographs on site)

Introduction

3. **Writing the Case (first draft)**
 - a. Revisit the learning objective and audience (Include this in the teaching notes. Will it meet multiple audiences?)
 - b. Outline the case (What is the decision? What are the key quotes? What are the key information points? What are the necessary exhibits?)
 - c. Write the story (Keep it short. 10-20 paragraphs, past tenses, avoid jargon)
 - d. Create the exhibits (What media are appropriate?)
 - e. Test with a confidant (check in on the what makes a good case, learning objectives and necessary information)
4. **Rewriting the Case (second draft)**
 - a. Review the case with the original resource person/case owner (Will it need to be disguised?)
 - b. Tighten the case (Cut everything not needed)
 - c. Fine tune the exhibits (Cut, edit, add to make it most useful)
 - d. Test drive the Decision Case (Try it out)
5. **Include in the Teaching Note**
 - a. Title of the Decision Case
 - b. Overview of the case
 - c. Copyright and author's name to contact for permission to use
 - d. Specific learning objectives
 - e. Context for how the Decision Case was designed to be used and suggestions for alternative uses
 - f. Lesson Plan including:
 - i. Overview
 - ii. Format
 1. Small groups
 2. Role play
 3. Video, pictures
 - iii. Flow of discussion
 1. Guided
 2. Open
 - iv. Closure
 1. Vote/rank options
 2. Reflect and discuss
 - v. Suggestions for questions that might be useful for discussion
 - vi. List of materials that may be helpful, such as:
 - Video/audio... to capture the *voice* of the decision maker
 - PowerPoint
 - Photographs or maps
 - Flip chart
 - Handouts
 - vii. List of additional resources
 - viii. List of skills and knowledge that would be helpful to teach the Decision Case effectively

Introduction

Additional Web-based Resource Materials

The following information refers to the use of Decision Cases in teaching. Please note that these are NOT Holistic Management® Decision Cases.

- An excellent set of resources is available at the following web site on how to teach with Decision Cases <http://www.mtholyoke.edu/acad/programs/wcl/casemethod/teaching.shtml>
- More resources are found at the following link with background on teaching with Decision Cases <http://ublib.buffalo.edu/libraries/projects/cases/teaching/teaching.html>
- An excellent article on the use of Decision Cases in Agriculture is at <http://ianrwww.unl.edu/ianr/csas/cur/cur5.htm>
- Additional Decision Cases in Agriculture are available at <http://people.umass.edu/jgerber/HMDC/webdecisioncases.htm>

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