

# AGRICULTURAL EDUCATORS CASE STUDIES

## IT WORKS:

### My Experience with Holistic Management

By Vivianne Holmes, PhD.

#### Introduction

**M**y farm is small by most standards, but just right for a single woman with a full time off farm job, who volunteers extensively and has a long-distance relationship. I have been farming for over 15 years. I board and care for 15-24 sheep and goats each growing season for another farmer along with the 5-8 goats and alpaca I own. I grow enough of my own produce, meat and eggs to sell or barter to have to fill out an IRS Schedule F. Over the years, I have had chickens, layers and broilers, geese, ducks and quail all of which I process myself for sale/barter or home needs. I've raised sheep for meat and wool and goats for meat. I've raised pigs to use as barter in exchange for farm-sitting or snow plowing. I raise Christmas trees that are donated to needy families each year and manage a small woodlot. This year I donated 40 Christmas trees. The woodlot provides some firewood. Timber harvest covers property taxes about every seven years. The woodlot is managed mostly for wildlife habitat and quiet recreation.

I do the majority of the work on the farm with occasional help from my partner, family, friends and members of a collective, Daughters of Yarrow (DOY). I have set up the livestock rotation, feeding and watering in such a way that a neighbor can easily care for the livestock when I'm on the road. Farm-sitting care is important because I travel for my job, for volunteer efforts, and to sustain a loving long-distance relationship. My farm-sitters have been key to supporting my quality of life statement, 'healthy, profitable farm' from the very beginning. During the last two years, I've been working with my sitters to help them understand the reasons behind what I ask them to do. I have explained what a grazing plan is and why it is important to move livestock according to the plan. I find they take more ownership now. Bartering pork and eggs with the sitters has meant they are more attentive to animal health and animal nutritional needs because it will be the food they eat. Animals that are healthier and reach saleable weight faster means more profits. A win-win situation.

I've always set goals in my life and worked to meet them. At a two-day Holistic Resource Management workshop nine years ago, I set a rudimentary holistic goal and identified my whole under management. The holistic goal and whole under management I created then gave me direction, but only like background noise, not as a daily mantra. It was more instinctive then and now it is a lifestyle.

My in-depth study of the framework began two years ago and has provided a deepening understanding of the whole framework. As a Holistic Management<sup>®</sup> Certified Educator in Training, I am facilitating two study groups that meet on a regular basis, one of which is the DOY. I have introduced Holistic Management to nearly 100 people through workshops, study groups and hands-on events. I am working with a University of Maine Cooperative Extension organization on restructuring and organizational management using Holistic Management.

Now Holistic Management permeates everything I do—at home, at work, volunteering, in relationships and on the farm. Holistic Management gives me the tools to make decisions, create plans and monitor my progress toward my holistic goal.



*Holistic Management<sup>®</sup> Certified Educator  
Vivianne Holmes*

**Whole Under Management (WUM)** As you will see with the original WUM and the current WUM, the depth of my understanding and thinking has expanded. One of the key differences is that I've included people resources in my current WUM, not just material things. The 1995 WUM focused on the farm rather than the 'whole of me.' The 2004 WUM looks at the whole person.

#### VJH's 1995 WUM

*People:* Vivianne

*Resource Base:* 15 acres (5 woods, 3 Christmas trees, 25 high tensile pasture, 15 woven wire pasture, the rest is homestead and gardens; house, large barn, cottage, goat barn; riding mower, roto tiller, weedwacker, lawn mower; sheep, goats, quail, chickens, rabbits; truck, car; 700 Christmas trees some harvestable this year.

*Money:* Large mortgage (8 years left); vehicles paid for; 3 retirement plans; off farm income; present farm income \$300 this year.

## Vivianne Holmes' Whole Under Management 2004

### Decision Makers

Me  
Prilla  
Father

### Resource Base

Land (15 Acres)	Pets
2 Barns	
House	Possible Loans from Father
Cottage	Friends
Outhouse	Neighbors (help)
Fencing/Pasture	Extended family
Livestock	Dori
H2O plentiful	Jeanne
Truck/Van	Darren
Equipment	Prilla
Tools	Father
Camping/Hiking Equip.	My diverse skills
	American Camping Association
	Women's Leadership Circle
	Cooperative Extension
	Daughters of Yarrow
	Sappho's Sisters

### Money

IRA  
3 Retirement plans + Social Security  
Salary  
Inheritance?  
Cash on hand  
Daughters of Yarrow - The Yarrow (barter system)  
Father for loans  
Farm  
Savings

probably wasn't ready to receive the information—everything in its season.

The elementary holistic goal I created that day gave me some direction and satisfaction. Unfortunately, though I was heading in the right direction, I still didn't have all the tools I needed to make quicker progress towards my holistic goal. At least I was moving forward. During the interim years, I would rewrite the holistic goal in different ways. The vision statement below was written a few months before I started Holistic Management training and is the basis of my present quality of life statement. Looking at my 1995 holistic goal I realize that the three sections were only partly correct. Both the forms of production and future resource base each have a mix of items in them. The future resource base has form of production items and nothing that really addresses what the future needs to look like for me to support the quality of life I want.

The 2001 Vision Statements captured some excellent quality of life statements. It still missed other parts of my life like off-farm work, volunteering, etc., so it did not represent the 'whole of me.' Things in separation from each other are not a true reflection of 'me.' Also, there were only vague forms of production included.

## VJH's Holistic Goal - 1995

**Quality of Life** - inner harmony; love of parents; self-sufficiency, economic security; freedom; exciting life; personal growth; social outreach; pleasure

**Forms of Production** - profit from farming; sustainable farming; profit; health; food production; travel

**Future Resource Base** - healthy pastures, fencing, waterways; Christmas trees and woodlot productive; support system for animal care when traveling; means of travel (economic)

## Holistic Goal

I've always been a person who set goals, but they were done in the traditional sense; for instance, I will earn a Ph.D., or I will travel to New Zealand. I would tick things off my list as I accomplished them. That worked fine until my mid-40's when I had ticked all those big and grandiose things off my list. I was left with the feeling - is that all there is? I felt like I hit a brick wall, and I was very disappointed. I wanted some other way to look at my world. That's when Holistic Resource Management came into my life—the WUM and holistic goal parts anyway. I attended a two-day training that only had time to provide an introduction of the basics—WUM and holistic goal. I'm sure we touched on some of the rest of the model, but I latched on to the holistic goal part. I've kept the pocket size model outline the presenters handed out in my day planner all these years even though I didn't understand most of what it meant. It was like a talisman, but I didn't have the key to interpret it. I didn't know what questions to ask. I

Vivianne's Vision 1/26/01	Grandmère's Farm Vision	Grandmère's Barnyard Enterprise Vision
To live life to the fullest	Self-sufficient	Educational,
To contribute to the betterment of the world	Feed self, family and friends	entertaining,
To do no harm	Heat home	profitable, safe, fun
To be peaceful	Provide lovely, wholesome living space	Healthy, well cared for animals
	Beautiful and peaceful	Add to my personal, farm and home visions
To honor my body	Clean, neat, repaired, sound	
To be holistic	Holistically run	
	Off-grid	
	Pastoral reality	

## Vivianne Holmes' Holistic Goal - 2004

Quality of Life: What gives my life meaning? What feeds me?

- I am a caring, giving, thoughtful, loving person
- I have loving, caring relationships - lover, family, and friends
- I have nurturing work and volunteering
- I cherish beauty, nature, open space, quiet, sun, darkness and solitude
- I thrive on intellectual pursuits, travel, education
- I fulfill the creative part of me through artistic pursuits, art, wool, knitting, farming, volunteering
- I am debt-free, financially secure
- I am self-sufficient with less impact on all natural resources and have a healthy, productive farm/woodlot
- I maintain good health habits

**Forms of Production:** What I need to produce to create my quality of life?

I produce the following to create my quality of Life:

- Profit from nurturing work and successful farm enterprises
- A home and farm that sustains, nurtures, is profitable, well maintained and productive
- Good time management to create leisure time to pursue intellectual and artistic pursuit, volunteering, travel, working my farm and commune with nature
- Financial resources to volunteer, travel, work my land and commune with nature
- Supportive activities that grows healthy, loving, caring relationships
- Work environments that are flexible, healthy and productive and not defined by a physical space

### Future Resource Base:

- Community—Community must be accepting, open, welcoming, liberal, has zero population growth, concern for citizens, support stewardship of the land, creatures and resources, and is self-sufficient and sustainable. Work environments that are flexible, healthy and productive.
- Land—We will have open space, conservation, ecological and sustainable natural resources that are healthy, thriving and shared with all.
- People—I will be perceived as an active, giving member of my communities by my neighbors, friends, coworkers, acquaintances and family by my good works, generosity, caring, giving and leadership.

I feel that my 2004 holistic goal is closer to the 'whole of me.' My statements are clearer and more complete. I have solid forms of production statements that support and direct my quality of life. My future resource base is a succinct picture of what my community, my landscape and I need to look like to support my quality of life and forms of production.



*Daughters of Yarrow*

I now feel I've created a viable, living holistic goal that gives me the direction and guidance that I've been seeking. This holistic goal is always in front of me holding me to the life I want. It is no longer just background noises.

### Decision Testing

In the past, I made decisions by creating a list of pros and cons for the decision I was making. In essence, decision testing was just a brainstorming of what I could think of in the moment for or against the decision I was making. It was only as good as my creative thought was in the moment. It was not always thorough enough and sometimes decisions proved faulty because I didn't think of everything. Also, I didn't have a monitoring system to identify when things were going wrong.

Now that I'm using the Holistic Management® testing guidelines, I feel I'm making solid, informed and better decisions. The guidelines probe all areas of possible concerns around a decision. It is a more structured process, and I'm not depending solely on my trying to think up every possible contingency on my own.

Below is an example of my thought process on a decision I've made just recently:

I assessed my holistic goal the other day and decided that work wasn't nurturing like I had written I wanted it to be in my quality of life statement. So I decided to take a one-week mini-sabbatical. I went to an island 10 miles off the coast and brought all the things that I needed to finish, start or think about with me. I then hiked to the office—a cliff 50 feet above the crashing surf, and finished projects, started new ones, wrote two grants and did all kinds of Holistic Management stuff! I accomplished in five days what would have taken four weeks at the office, or I would have just given up on doing it at all. It was a wonderful feeling of accomplishment! And it brought the joy back to my off farm work.

And the only interruptions were seals cavorting for hours in front of

me or an occasional whale surfacing on its way south.

It is amazing how being attentive to logjams that get in the way of our holistic goal is so important. I had been getting more and more angry and frustrated about work and feeling like the next three years to retirement were going to be hell. But I identified one of the logjams in my work life and addressed it. The result, as far as I'm concerned, was spectacular and very productive. Here's how the decision tested:

### Defining the Action

Normally the week on the island is a traditional vacation week for me. BUT . . . the atmosphere at work and the constant interruptions at the office were just about pushing me over the edge. It was causing my work to back up along with making me angry and frustrated. If I dealt with what was going on in the office, I would have taken more of my precious work time. Or, I could find a way to get the work done. I felt it was more important to get the work done. The atmosphere problem has already shown itself as a lost cause.

To get the work done would have normally meant giving up my vacation week. I skipped straight to the "Society and Culture" testing question and decided that giving up my vacation was totally unacceptable. So the question I posed was **"Do I go to the island and take the work with me?"**

### Cause & Effect

*Does this action address the root cause of the problem?*

**Problem=Not being able to complete work.** The atmosphere and interruptions at work have proven to be non-fixable in the past and I'm not willing to put energy/time into them again to help fix the situations. Therefore, taking the work with me would give me the chance to enjoy the island when I wasn't doing work stuff, and, even when I was working. *And*, I got to be in a place that rejuvenates me. The action passed the test.

### Weak Link

#### - Social

For some, this should not pass because organizational attitudes and beliefs would not see this as work time or the location not a 'proper' office. It goes against the grain of 'what work is' for most people.

*But*, this one passed for me because I knew I'd get the work done. The results would address any social concerns, so this action passed

#### - Biological

Really this test isn't applicable to this situation. But in playing around with the concept, I felt that this biological organism (me) would have crashed and burned if I didn't get my time on the island and get my work done. Action passes.

#### - Financial

Again, this test isn't really applicable. But, as I looked at the financial reality of the situation, I thought work got more than their money's worth. I had already planned the cost of vacation into my finances over a year ago, so the action passes

### Marginal Reaction (Comparing two or more actions)

*Which action provides the greatest return, in terms of my/our holistic goal, for the time and money spent?*

-Not going to island – unacceptable

-Going on vacation only – mostly unacceptable. Not getting work done would have destroyed the enjoyment of being there.

-Going to the island to work – PASSED – an attractive alternative and doable. Best of both worlds.

### Gross Profit Analysis

Not applicable.

### Energy/Money Source

*Is the energy or money to be used in this action derived from the most appropriate source in terms of my/our holistic goal? Will the way in which the energy or money is to be used lead toward my/our holistic goal?*

-Work energy—excellent. I was refreshed, left all distractions at office, quality time to think creatively and do good work.

-Personal energy—excellent, was able to do the things on the island I enjoy when work was done for the day, and I made my own schedule. Great use of money both personal and work. Action passes.

*I now feel I've created a viable, living holistic goal that gives me the direction and guidance that I've been seeking.*

### Sustainability

*If I/we take this action, will it lead toward or away from the future resource base described in my/our holistic goal?*

Here, I realized I needed to adjust my forms of production and future resource base to include: "Work environments that are flexible, healthy and productive and not defined by a physical space." Action passes.

### Society and Culture

*Considering all the questions and my/our holistic goal, how do I/we feel about this action now?*

I feel great about my decision. My decision to go to the island supported my quality of life and it did not adversely affect the lives of others. Action passes.

So cool! What a neat process! In the past I would have given up the vacation and would have lost on both counts. Got to love it!

By using the testing guidelines I am now testing decisions against my holistic goal. That was another thing missing from the other method I used before Holistic Management.

## Financial Planning

Over the past two years I've worked with a financial consultant. We have been working on tightening up my investments, etc. in anticipation of my retirement. I have gathered together all my information and monitored investment growth. I have also looked at my estate planning and written a will that includes a provision for putting my farm into a land trust so it will not be lost to housing development.

What I am still struggling with is creating a formal holistic financial plan. Since I'm the only one spending my money, and I prepare my own taxes and control my own investments, I feel I have a pretty good idea where my money is. I have, though, made a commitment with my Daughters of Yarrow (DOY) Holistic Management study group that I will not ask them to do what I'm not willing to do. So, we are all working on getting a financial plan ready for 2004.

An interesting thing happened when I shared with my DOY study group that I was struggling with doing my financial plan. They then took the role of facilitator/coach and helped me work on articulating why I was resisting creating a financial plan. What came up for me was that I have always felt that I've had plenty/enough money to do everything I need or want to do. My needs/wants are not that grandiose anyway. If I have enough, then why worry about it? Yet, as I head towards retirement and a fixed income it makes sense now to get a handle on my income and expenses. So a couple of the members in the study group are coaching me through the steps of the plan. They are providing assignments and time lines for me to get things done just as I have done with them during our study of Holistic Management. They have gifted me with their caring and support and I'll have a finished plan for 2004.

## Grazing Planning

I love planning my grazing and moving my animals to get the most out of my pastures. I have taken neglected fields grown up with weeds, brush and small trees and created lush pastures. I have approached grazing from the point of view of the health and growth of the plants, and health and protection of the soil in balance with the livestock. Ten years ago, I worked with Bill Murphy and fine tuned the care of the pastures by incorporating his theories and was able to increase my carrying capacities. I am able to support 21-24 sheep, goats, pigs and alpaca on less than 3.5A. The pasture is their sole food (plus minerals) from May to November. Three fourths of the herd (boarded livestock) leave for their home farm in September.

The trick on my farm is that I have to find that fine balance between

grass health and growth, and livestock harvesting of the grass so that I don't have to mechanically harvest the excess grass that most livestock farmers in the Northeast have to do. Part of that balance is carrying the right amount of animals. The other part of the balance is using management intensive grazing. It's a wonderful jigsaw puzzle that's worked for years.

I've done the Holistic Management® grazing plan these last two growing seasons. The plan is fun to put together and to follow, and reinforces what I've been doing. It has allowed me to see that I can still increase my carrying capacities without needing to mechanical harvest the excess.

Another one of the benefits of having my Holistic Management grazing plan is that others have been curious about what I am doing. A few have even volunteered to move the animals when I'm on the road, which provides all those wonderful teachable moments. The two DOY farms that have livestock are planning to do Holistic Management grazing plans this winter. Another benefit is that I've realized that my

farm sitters need to have an ownership and knowledge of why they are doing what they do. So instead of my dumbing down my moves to make it easier for the sitters, they now understand and can manage the planned moves as I have planned them. They are also able to make day-to-day decisions for the health of the livestock and grass.

## Land Planning and Biological Monitoring

Since I bought the property 16 years ago, I have documented my improvements and plans for the land. I've worked with USDA NRCS, SWCD, FSA and the Maine Forest Service. I have designed and installed fencing,

worked on timber stand improvement, planned a water supply system and access, adjusted herd size, marked my boundaries, relocated and renovated buildings. Of course it's taken 16 years to take a rundown, junk infested piece of property with dilapidated buildings and make it a functioning, productive and sustainable small farm.

I have mapped the property, soil tested, identified soil types, monitored vegetation and know my community dynamics, water cycle, mineral cycle and energy flow.

I have gathered basic baseline biological monitoring information and plan to update it each year for my pastureland.

From the biological monitoring I found:

- A large strip of my pastures needs to be amended with lime and nutrients and frost seeded this spring. I also need to adjust my grazing paddocks so the animals break up the lichen/moss and

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the grasses and legumes can take hold faster.

- The woodlot needs more thinning to release quality timber trees. Quality trees need more pruning to increase saw log length.
- Christmas trees are doing well and have about three to four years more of harvests left. I need to butt prune this winter to increase the value of the trees. I also need to keep up with removal of ferns that are a vector for a disease in fir trees.
- I need to reclaim the back field from white pine growth and put it back into a useable pasture. I have been too slow to reclaim and trees are getting more troublesome to get out.
- I need to be more diligent in care of garden(s) soils. I need to use cover crops, mulch and green manures throughout the year to protect and enrich soil but mostly to control weed growth. I have let that slip the last few years.

From doing my land plan, I will make these changes:

- My holistic goal states that I want a profitable farm. To do that, I want to increase my meat goat herd when I retire in three years. I need more pastures; therefore, I need to reclaim the back field from white pines. I need to use the next three years to work on reclamation, soil and grass improvement and new fencing. Monitoring will be key to keeping me on track.
- The lower pasture could provide me easier access to the back field and the temporary paddock that is already there if I drop in a new gate in back corner of the front pasture. It would save time and provide a controlled and less stressful move for the livestock and me.
- Christmas trees are not an enterprise I want to continue. That part of the back field will be turned over to the new pasture as the trees are removed.
- Garden plots need to be improved and maintained to increase production of revenue producing crops like catnip.
- The woodlot will receive thinning and pruning over the next two years, and the fir stand will be improved to provide quality wreath-making tips (value added product).
- I will continue to work on putting my land in land trust so that it is not developed except for farming, open space, and timber stand improvement. This supports my future resource base.

Monitoring of the above plans will allow me to make corrections if needed. Because of the timeline I've set for myself—retirement in three years—I will have a formal monitoring session each season (4 times a year).

## Summary

Part of my story is sharing Holistic Management with others. Sharing it with others has been easy for me because I know it works through my own daily practice. My enthusiasm about Holistic Management attracts others to check it out and that leads to their more in depth study of Holistic Management. In the last year and a half, I've worked with nearly 100 people - 14 people in study groups that meet once a month; two Cooperative Extension groups that are working on applying Holistic Management to their education programs/organizations; and three all-day intensives for farmers on setting a holistic goal and a

whole under management.

I've come a long way with my study of Holistic Management since my initial introduction nine years ago. The last two years of study have been a powerful time for me, not only on my farm and with my personal life, but also with my off-farm work and my community. I am so ingrained in my practice that it encompasses all I do. I've improved my decision-making, am more organized and have clarified where I am going in my life. And, I don't ask, "Is that all there is?" anymore. Life is full, happy and joyful. And when there are bumps and turns in the road, I still know where I'm heading and have the tools to get there.

But better yet: A member of one of the study groups called the other day. She was just bubbling. "I love Holistic Management! It works! Guess what? Remember in my quality of life statement where I said, 'I want to love others with deep supportive, appreciative love—a lifelong intimate partner.' And my form of production was 'listening to and trusting my heart and the movement of love in the world' Well, Holistic Management works! I put it out there and it's happened! I've met the most wonderful person after all these years! Thank You! Thank You!" Holistic Management the matchmaker - can it get any better than that?

If we look at the impact of Holistic Management, we see the following results:

Decision/Process	Result
Holistic goal	Increase meaning/happiness in life ↑
Testing questions	Improve decision-making ↑
Whole under management	Improve relations with others ↑
Decision- Working vacation	Decrease stress ↓
Decision - Working vacation	Increase productivity ↑
Decision - Working vacation	Improve quality of life ↑

## Decision Testing Summary

Decision—	Pass	Fail	Not Applicable
<b>Take a working vacation</b>			
Cause & Effect	X		
Weak Link-Social	X		
-Biological			X
-Financial			X
Marginal Reaction	X		
Gross Profit Analysis			X
Energy/Money Source & Use	X?		
Sustainability	X		
Society & Culture	X		
Outcome—Took the working vacation			