

AGRICULTURAL EDUCATOR CASE STUDIES

THE SKEPTIC'S STORY:

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By Seth Wilner

My story is one of a skeptic who only embraced Holistic Management after trying it on for size personally. My journey with begins with my introduction to it, my personal exploration, my professional experiences with Holistic Management, and my continued experimentation.

How I Came to Study Holistic Management

My exposure to Holistic Management was simply by accident. I was not looking to learn about it, as I had never heard of it. In August of 2000 I had moved from northern Wisconsin to Newport, to serve as a county agricultural agent working for UNH Cooperative Extension. Over the next year, Extension specialists and other county agents took me around my county introducing me to the numerous farmers who make up Sullivan County agriculture.

My county has a diverse agricultural population consisting of dairy farms, commercial vegetable farms, commercial fruit operations, grass based livestock producers, greenhouse and ornamental operations, home gardeners, and landscape operations. Within these various commodity categories are production methods spanning the gamut from organic to high input.

As I went around the county meeting the growers and learning about the culture and natural resources, my attention, somewhat subconsciously, kept getting drawn to peoples' decision making methods. I am a "why" person; I need to ask the probing questions to understand why something was done, or why something is in its current condition or state of affairs. This inquiry allowed me to see the wide range of decision making processes and influences used on farms. Some farmers kept

meticulous records and used this data as a primary resource in making decisions. Other farmers followed expert advice, be this feed and fertilizer dealers, Extension agents, NRCS staff or the like. Some growers were quite well read and implemented new trends or research, others went on gut instinct. I saw numerous other ways and modifications.

Decision making became a keen curiosity of mine as I saw the dramatic impact decisions have on the farm's profitability and on the environment.

I had not yet tuned in to examining the farmer's quality of life, so this was not one of my thoughts at the time.

With decision making a keen curiosity, happen chance had it that an invitation to participate in a Whole Farm Planning using Holistic Management Decision Making Framework Training Program came across my email. Had it not been for the words "decision making," I would not have pursued the opportunity. I was already quite busy, I am not a keen fan of traveling for conferences and business,

and I do not enjoy being away from home for extended periods. But I was intrigued to learn about decision making, farm management, and whole farm planning.

Personal Exploration - Quality of Life

I received my training materials in the mail and was a touch concerned by the amount of homework assigned prior to arriving for the first session. I read the 200 some odd pages that were assigned, but did not stop to study the concepts with which I struggled.

I arrived at my first session and spent the week learning about Holistic Management. I had a solid understanding of how to go about the process



Holistic Management Educator Seth Wilner

of delineating the “Whole Under Management” and forming a “Holistic Goal,” a shallow understanding of the “Testing Questions,” and little to no understanding of the principles under girding Holistic Management. This lack of understanding of the “why” made it challenging to teach and incorporate Holistic Management into my life, yet the understanding of the “how” allowed me to muddle through.

I returned home after the first week a touch skeptical of the whole process, especially because I lacked the “why” for each step. This skepticism proved an asset, as this drove my personal exploration. I decided to try Holistic Management for size first before I introduced it to any growers. I did not want to be teaching some “bunk jive.” I approached my wife Sharon and told her about my week and about my plans to start managing holistically at home. She too was skeptical, but when I presented to her that my null hypothesis was that Holistic Management would not impact the quality of our life, our financial condition, or the environment on our five acres, she said she would indulge me.

So we sat down and went through the steps. I brought a flip chart home, set it up in my living room, and served as both facilitator and participant as we went through *At Home with Holistic Management*. Our conversations were rich, and we learned worlds about each other. It was just like we were dating again, discussing ethics, values, philosophies, life views, hobbies, skills etc. At one point we did an exercise where we wrote down the top 10 things we liked about ourselves and the top 10 things we liked about each other. We exchanged our lists and were blown away by each other's thoughts and words. In fact our efforts forging a holistic goal catalyzed many a romantic moment!

My experiences with defining our whole and forging a holistic goal demonstrated to me even at this early stage that the process was as potent as the product. I also want to identify that it was extremely helpful to Sharon and I that we held in the front of our mind that this was for our internal use and not for external consumption. We did not have to worry about the wording or how it sounded or if people would judge us, or anything. That freed us to simply use words to capture our true thoughts and feelings, and it allowed us to be playful, silly, serious, spiritual, emotional and philosophical in our answers.

With our first temporary holistic goal formed, we took the advice of co-trainee Jim Weaver and started testing everything. We had a great deal of fun with this, and also struggled to figure out what to do in certain situations. One such situation I describe in my classes I teach.

My neighbor knew I was looking for a truck. We were always borrowing friends' trucks, and we could sense this was getting old. So we tested the decision to purchase a truck and decided to do so. We did not want to go into debt so we limited the cost of the truck to \$1000. My neighbor offered his old truck and his muzzle-loader for \$400. The truck needed an

estimated additional \$600 in repairs. It seemed like a good idea, so we agreed. As part of the agreement, my neighbor was supposed to get the truck into the mechanic using his trailer. Well, the truck sat there for months, and then got buried under feet of snow. I was sort of bummed out, so decided to actively look for a truck elsewhere.

Indeed I found another truck with a plow for only \$1,200. A better truck for about the same money. We had the extra \$200 and could have the truck now, cool! So, I tested the decision and flagged in my mind that it failed the social weak link test because buying the other truck could very well upset my neighbor and hurt our relationship. Likewise, the society and culture test also made me queasy. I like my neighbor a great deal and value our relationship and felt in my gut that buying the other truck could definitely have the potential to bum him out. The other test questions seemed to have passed. Sharon and I reasoned through our logic and the results of the testing questions. I decided to go down and talk with him and see if buying the other truck would upset him.

I feel quite strongly that had I not had my whole under management written down, and had I not had a holistic goal, I would not have made the decision to contact the bank president.

During our conversation he said it would be fine if I bought the other truck, but I could tell that he was a touch hurt. I went home and tested the decision again. I decided that the red flags were still there, and I valued my neighbor's relationship over the truck. I returned to my neighbor, explained to him my thinking and told him I would buy his truck. He was moved by this decision, told me he would get the truck to the mechanic in short order and our relationship was the stronger for it. I was quite pleased by the situation.

This was my first exposure to the potency of Holistic Management. By using our holistic goal to simultaneously consider the social, economic, and environmental impacts of a potential decision, our quality of life was enhanced. There is little doubt in my mind, or Sharon's, that I would have rationalized how it was my neighbor's fault for not getting the truck to the mechanic, for being slow, lazy, etc. And, indeed, he could have acted far more quickly. And so it could have been that I owned a better truck, had in shorter order, and my neighbor lost out because he was slower than I wanted to tolerate. Yet a good relationship with our neighbors is far more important to us in our life.

Just for the record, my neighbor actually did not get the truck to the mechanic in short order; the truck was buried under deep snow and had to sit until spring. Once repaired, the truck lasted only for 5 uses and then died a permanent death. The muzzle loader is great, and my neighbor and I have now become close friends; he has opened up worlds of opportunities to me and my wife. No matter how you slice it, that was a decision that moved me far closer to the life Sharon and I desire.

Over the months other significant impacts on our quality of life occurred. In one situation, my car died, and I needed to replace it instantly. After finding another car to buy, I approached my bank for financing. Since the vehicle was a 1996 model, they would only offer me a 9.9% interest rate. This was quite disturbing to me, so I refused the offer and went home.

I stewed on the drive home and thought about options. I got out our Holistic Management materials and looked at them for ideas. I saw in my future resource base that I had described a rural community with small town amenities and friendly culture. It occurred to me that this bank was not meeting this expectation of mine. I had all my accounts there, was a loyal customer, etc. In my resource base in my whole under management, I had identified community members with whom I served on boards. I recalled that the bank president served on an economic development board with me. I decided to call him and discuss my situation and share with him my expectations regarding bank services. We set up an appointment and got together.

During this conversation he asked my why I didn't use a home equity loan instead. The rates were better and the interest was tax deductible. I had simply not thought of that before, nor had it been presented as an option. We looked into this option together, only to find that I did not have enough equity in my home to get the full amount of the loan that I needed. He waived that restriction, granting me the full loan at a 4.75% interest rate. Indeed this was the small town friendliness that I expected from my bank. No doubt this positively impacted the quality of my life, and my decision to contact the bank president helped me toward my holistic goal.

I feel quite strongly that had I not had my whole under management written down, and had I not had a holistic goal, I would not have made the decision to contact the bank president. Seeing it on paper triggered the thoughts, and understanding more fully how Holistic Management worked, helped me implement the action. I tested the decision prior to implementing it, and this gave me the confidence to move forward. It also helped me craft the tone of my conversation. At first I was going to call the bank president and tell him of my expectations of the bank I use and inform him that if his bank could not meet these expectations I would find one that did. Instead though, I simply shared with him my expectations for the bank I use and asked him what we might do to address the gap I was experiencing. Testing my actions using the first method illustrated that I could indeed negatively impact people in my resource base, so I decided to soften the tone and this action passed through the testing questions much more smoothly.

A final example of a direct and potent impact in the quality of my life occurred while I was in my car driving home from yet another meeting. I was extremely exhausted and my mind wandered to my holistic goal. I recognized that I had not produced balance in my life, and that far too much emotional and physical energy was being directed to Extension work. By trying to please so many people and being spread so thin, I was not succeeding in meeting my personal or family goals. In fact parents, siblings, and in-laws were expressing hurt and anger that I never had time to see them. Sharon was reminding me that I was often gone or too exhausted when at home to be emotionally present. Such is the life of an Extension Agent my colleagues told me. I chose not to accept this and worked with Sharon to create a threshold for evenings per week doing

work related things, and for weekends per month.

I also resigned from some town and county Boards, Commissions, and Extension committees. This freed up a lot of time and energy. I used my holistic goal to shape my plan of work and also to determine in which civic activities I would participate. They say it is difficult to see when you are over your head, and even more difficult to act to change such conditions. Holistic Management helped me both diagnose the situation and respond to it in ways that brought me closer towards my holistic goal and the quality of life my family and I desire.

Personal Exploration—Financial Impacts

As months passed by, Santa delivered yet another colossal homework assignment to be completed prior to the next session. My joy was palpable as I dove into the assignment! This time I needed to work with Sharon to create a holistic financial plan. By this point in our lives, Sharon and I were rabid budgeters, so we had most of the data available.

We decided to devote 10 percent for our planned profit and try this on for size. The book suggests using some percentage so you can feel it, but we decided to be gentle. In short order we increased our planned profit to 24 percent which was quite a sum of money that started accruing. We monitored our finances monthly, and this gave us firm control over our spending habits. As we were somewhat liberal with our budget allocations, we actually had more money allocated than we spent. The net result is that we were in fact in better financial condition as a result of Holistic Management.

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Our planned profit has proven both helpful and useful, strongly increasing the quality of our lives. In one situation, our septic system failed without warning. These repairs cost between \$6,000-\$10,000. Had we not accrued money through our planned profits, we would have been in a tremendous bind. Having these resources unspent and undedicated, we were able to weather the storm and come out the other end with no debt incurred. That event was quite eye opening. Through Holistic Management® Financial Planning, we were also able to remodel our house, buy real furniture for the first time in our lives, and plan a vacation to Ireland together. No doubt all positive impacts increasing the quality of our lives, and no doubt bringing us closer towards our holistic goal.

The Holistic Management® Financial Planning process has a section where you brainstorm potential new resource generating ideas. You may not be looking to embark on any such new ideas, but they help you think about ways to diversify your income. Sharon and I are both salaried professionals, so it was not our intent to look for any new income earning means. As it was part of the process, we engaged in the exercises. Through this we recognized that our love for small fruits and vegetables interfaced well with the growing farmer's market and growing demand for organically produced foods. We identified that we could sell

at the farmers market and generate income that might be enough to pay for vacations or other such opportunities we could not afford now. We now have a three-year plan and have been shaping our fruit and vegetable beds and growing areas to meet this desire. Again, absent Holistic Management, we would not have come to this same conclusion, as we were not even considering exploring new income generating methods.

Personal Exploration—Environmental Impacts

My wife and I are avid gardeners. I focus on fruit and vegetable production, and Sharon focuses on landscaping with annuals, perennials, and woody shrubs. At first we used traditional methods for raising our crops and then switched to organic production methods. After learning skills necessary for organic production, we felt confident that we were producing a healthy food source in a sustainable manner. This confidence was based on our belief that all organic practices were sustainable.

After our third session which focused on the ecosystem processes and biological monitoring, I was challenged to revisit our approach to managing our land. I truly agreed with the proposition that nature was far too complex to think humans can correctly predict the complex interactions that were occurring across a landscape. Likewise, I found it extremely helpful to focus on ecosystem processes instead of actions. So our focus changed from one of implementing organic practices, to one of monitoring the impact of our actions on the water cycle, the mineral cycle, biodiversity, and on solar energy flow.

It is hard to describe the potency in this paradigm shift, yet it is a very different approach that results from such a paradigm shift. First, it makes one far more connected to nature and all of its complex interactions. Second, it frees one from simply looking to the books to see what the accomplished organic growers are doing and implementing it on our land.

By monitoring our practices, I have come to learn so much more about the impact of my actions on the soil, mineral cycle and so on. Likewise, Sharon and I have altered our practices as a result. At one point, we put up sticky traps to see how much erosion was occurring under one set of growing practices versus another. Both practices were considered sustainable, yet one resulted in far more wind erosion than another. Even the mulches we used were more keenly scrutinized, and as a result we switched from black plastic to straw mulch for the crops that did not require the added heat. For those crops such as tomatoes and peppers that benefit from the extra heat units black plastic provides, we turned to recycled plastics and use these over again each year, reducing our wastes.

Our actions were influenced by our mind set, which was truly impactful and rewarding. We also cropped differently, taking advantage of vertical and horizontal interplanting techniques that more efficiency captured the

sun's energy. Here again, tuning into the concept of solar energy flow moved us to this transition.

Failed Null Hypothesis

So there it was, plain to see. My null hypothesis that Holistic Management would not impact the quality of our lives, our financial condition, or the environment on our five acres was clearly wrong. It was obvious to me how the process of defining our whole under management and our holistic goal had brought Sharon and I closer together. Likewise our overt commitment to produce respectful communication enhanced our relationship and built trust in our marriage.

Additionally, the improvement in our quality of life was tangible and plain to see. Our financial conditions had also improved, and we were observing significant increases in our savings by planning our profit. The way we managed our land, raised our food, also was positively impacted by our adoption of Holistic Management. Likewise, it was potent to have as a primary philosophy the notion that decisions need to be monitored for their first sign that they are deviating from their intended outcomes. This has proven so fruitful and helpful. I was convinced, so now I felt confident that farmers and farm families could benefit from this process, and that it would be worth their time and energy.

So there it was, plain to see. My null hypothesis that Holistic Management would not impact the quality of our lives, our financial condition, or the environment on our five acres was clearly wrong.

Changing the Way I Approach My Job

My knowledge of Holistic Management influenced my professional work in two primary ways; it changed how I approached my farm visits, and it became 40 percent of my educational programming activity.

With respect to the farm visits, this was a dramatic change as it re-focused my mind in a new and unique manner. Like most Extension Agents, I went out to farms for numerous reasons. Upon arrival, I would work with the farmer to address the primary issue for which I was called out there. Perhaps this was a weed issue, whereby I would go with the farmer to the fields, identify the weed, provide a menu of options for controlling or eradicating the weed, talk in general about the soil conditions, and inquire about soil test levels.

Other times, financial issues were at the heart of the visit, and in these cases we would look at their books and financial records and discuss methods of reducing costs, increasing efficiency, expanding or contracting the operation, or means of financial assistance. Here again, I would provide a menu of options and work with the farmer and specialists to discuss the pros and cons.

Indeed, I still do the same actions, but now, my farm visits are augmented by a holistic perspective. I am now considering and inquiring about the social issues facing the farm and the farmers. How is their physical and emotional health, family relationships, labor situation? Do they have any down time for relaxation? Do they desire this? What type of life are they seeking? What are their values? I now ask these and many other

questions and weave them into the context of the options and answers I provide. Likewise, I am not simply identifying a weed now, I am considering the farm ecology and looking for reasons as to why the weed is there, and if it truly is a problem. I look at the entirety of the farm environment and focus on how their inputs and cultural practices are impacting the water cycle, the mineral cycle, the farm's biodiversity, and the solar energy flow. Likewise, I introduce the necessity of monitoring actions to see if they indeed are resulting in their intended outcomes. And instead of waiting until the end of the growing season, one needs to monitor actively throughout the growing season and take corrective action when they measure the first indication that their actions are not achieving their intended outcomes.

By integrating the social, economical, and environmental parameters into my farm visits, I have enriched my relationships with the farmers I work with, I have provided more long-term sustainable solutions and suggestions, and I have helped them see the inter-relationships between the three parameters. I know this has increased the quality of several farm and farm families' lives, and I believe, but have not yet measured, that this has improved their financial situation. Likewise, I think that we will be able to measure positive environmental impacts as well.

A side benefit has been the impact that this approach has had on my colleagues and co-workers. When I make farm visits with Extension specialists and other county educators, they see my approach and hear it as I interject it into my discussions. I explain to them why I am asking these questions and what my approach is. Often my colleagues will provide their recommendation, and I will add that the farmers need to consider whether this fits their farm and their goal and then make their own decision. At the beginning this caused friction between me and some colleagues as they thought I was undermining their recommendations. I explained to them that we could not possibly know all the factors influencing and affecting the farm. All we could do is provide recommendations and encourage the farmer to think about how this decision impacts their quality of life, the farm finances, and the farm's environmental conditions. Sometimes there were great learning moments. Other times, we sat quietly in the car. Changing paradigms is not always easy!

The other major change in my job as a result of my Holistic Management training was my programming agenda. After having test driven Holistic Management at home, I was satisfied that I wasn't passing on some crunchy granola jive. Instead, I was confident that the process would benefit farms as it did with my family and in my life personally. I also was fortunate to have a boss who strongly encouraged me to focus my educational programs on Holistic Management. As I developed my three year plan of work, I dedicated 40 percent of my time to teaching Holistic

Management and working one-on-one with farms to develop whole farm plans using Holistic Management.

I began teaching Holistic Management with presentations and lectures. At first, these lectures were filled with background information on the development of Holistic Management, then I would explain the model, and finally benefits farmers and families could expect to realize. All in all, this went over like a lead balloon. Evaluations demonstrated that farmers were bored in my presentations or that the process seemed too dogmatic and required for too much time and energy. Other criticism included that Holistic Management was too rigid or farmers did not need want to change the way they were doing things. I found that it was not a realistic expectation to enter a room of people who knew little or nothing about Holistic Management and expect them to become excited and engaged through a 60-90 minute lecture or infomercial.

I changed my approach and began engaging my learning community. During these early days of teaching Holistic Management, things went less than smoothly. I would arrange an appointment and meet with the farmers at their homes, farms, and in some cases in their sugar houses while they were boiling sap late into the night. I would explain what Holistic Management was and how we would go about defining their whole under management, developing a holistic goal and using this to test questions. The glaze over their faces demonstrated to me that once again I had blown them out of the water prior to engaging them and piquing their interest.

Additionally, I had no real understanding of the under girding principles of Holistic Management, so I was not able to effectively answer their questions and explain the "why" behind what we were doing. This was definitely a weakness of my training, and I felt no less than a complete fool on many occasions when working with the farms. There is no doubt that my lack of knowledge and understanding in Holistic Management during these early times turned

off the farmers I had hoped to engage. The traditional relationship between farmers and Extension Agents is one in which the Extension Agent is the expert. Whether this is desired or not, this was the working paradigm. Lacking the expertise, the farmers, almost to a person, were turned away from Holistic Management. It seemed too much work, and I certainly lacked the expertise to instill in them the confidence to engage in this process.

The positive side of approaching farmers to work with me on Holistic Management was that it exposed my deficiencies and lack of knowledge and challenged me to learn more and augment my skills. I was also challenged to find a way to hook the farmers' interest. The Grateful Dead have a line in their song "Black Throated Wind" that reads, "You ain't gonna learn what you don't want to know". So how was it that I would influence them to desire to learn Holistic Management? This conundrum

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was something I spent time exploring.

During one visit to a farm family with whom I had a close relationship, the farmer asked me if I had gone through this whole process and if so what did I get out of it? I explained the impacts that it had on my life and watched him as he listened earnestly. Voila! The impacts of Holistic Management had caught his attention. I went back to my office and hit the web looking for Holistic Management impacts.

Shortly after this event, I was a presenter at two regional events. I began my presentations by teasing the audience with two questions. The first question was true or false. The question read, "Money is the most important thing in my life and the driving force behind why I farm." Of course, everyone wrote down false and laughed aloud. The second question asked them to cross out all the things from the list I was about to provide that was not meaningful in their lives. The list included family, community, money, a clean environment, and a good quality of life. Again, no cross outs were made and a light humorous air was created in the room. I then discussed these questions and why I had written them. If money was not the driving force behind your life and your farming ventures, then why should it be the principal factor driving decisions? Likewise, if community and family and quality of life and the environment were important, along with money, then why not have these as factors governing decision making. This approach caught people's attention.

Next I ventured into defining the purpose of management. I led a discussion about the purpose of management and kept this going until we distilled it down to its fundamental purpose, decision making. Management was a tool to allow the farmer, business person, or family to make decisions to achieve their goals and objectives. That was why we kept records, collected data, drafted strategic plans and so on.

Next I discussed the impacts of Holistic Management using my own personal experiences, other data, and any local anecdotes I could muster. This too proved to grab and keep the audiences' attention. The more local the examples of impact, the greater the interest. I tuned into this observation early on. During the rest of the talk I presented the model and the tenets of Holistic Management, and, invariably, I would lose the audience here.

I also recognized that Holistic Management was not for everyone. In my experiences, the audiences most receptive to Holistic Management include farmers who are in crisis mode and need to make dramatic changes to their operations, and also highly progressive farmers who desire to challenge themselves with new approaches and new paradigms. Again, these are my experiences, and I do not suggest that these are global truths. Yet the farms that were doing well, or ok, or those who were the traditional stubborn Yankee farmer have shown little or no interest in adopting Holistic Management. They disengage fairly shortly into the process if they engaged at all.

My Holistic Management work with the farmers willing to learn has truly yielded fruit. The processes used in developing a holistic goal and defining one's whole have resulted in long needed communications.

Sometimes tears are shed, anger is vented, joy is expressed, dreams are recast. Always, the sessions prove to be intimate and deep. There is an increase in the quality of life of those who engage in very short order. Likewise, those who endeavor holistic financial planning say they know this will increase the profitability of their farm and family budgets.

I have also infused my Holistic Management knowledge in more subtle ways. We offer traditional farm management education in New Hampshire. In this curriculum, we teach goal setting, cash flow budgets, enterprise budget analysis, balance sheets, partial budget analysis and the like. I infuse Holistic Management into these curriculum when I teach and co-teach with colleagues. Clearly it fits nicely in the goal setting sessions, yet it also comes up in all the other materials as well. If your cash flow budget shows you have a deficit for the quarter, what action will you take? Will you use your family savings? Take a loan from farm credit? Ask another family member? These questions come up, and I lead a discussion as to how will you make the decision. Again we get back to ethics, values, the need to consider and hear the voice of all the people who are affected.

The same holds true with the converse. A surplus is realized at year's end, how do you use this? Do you invest it in the farm for capital improvements or do you increase the family draw to take a vacation or do home improvements? We have the same sort of conversation.

These examples could continue, as partial budget analysis helps one examine the economic impact of one action over another. Yet, what about the social impact and the environmental impacts? I infuse these ideas into this lecture as well. Having done this enough with some of our Extension specialist, my organization has asked me to provide a training for the Agricultural Agents next fall because they understood the impacts of Holistic Management and how it clearly affected all aspects of sustainable agriculture and increasing the viability of small farms.

Over time, the population of farmers and colleagues interested in learning and implementing Holistic Management has increased and continues to do so. I look forward to working with this ever growing audience, all the while refining my understanding and teaching methods.

Outcome Summary

Decision/Process	Result
Holistic goal	Increase communication ↑
Understanding Ecosystem Processes	Increase efficiency ↑
Financial planning	Increase profit and savings ↑
Testing questions	Improve relationships ↑
Testing questions	Balance/more personal time ↑
Decision-making process	Improved effectiveness at work ↑