

**Northeast Sustainable Agriculture Research and Education Program—**  
*Helping Farmers in the Northeast*  
By Heather Smith Thomas

For the past two-plus years, a group of 29 agricultural professionals in the northeastern states have been going through a Northeast Sustainable Ag Research and Education Professional Development Program (NE SARE PDP) program in Holistic Management, directed by Sarah Williford through the Center for Agricultural Development and Entrepreneurship (CADE). Sarah's journey led her to connect with other HMI Certified Educators to see how they could expand the pool of agriculture educators in the Northeast trained in Holistic Management. The following is an article about that program and some of the educators who were trained in it and how the program has developed their professional capacity, as well as the communities they serve.

**Sarah Williford**

Sarah is a farmer herself, and a trained HMI Whole Farm/Ranch Planning instructor. Originally she had trained in HMI's Beginning Women Farmer Program in New York State. "This training affected my life so much that I wanted to stay connected to others with this knowledge, and I eventually became a coordinator for the Beginning Women Farmer program that was still going on in the northeastern states through Holistic Management International. This was accomplished through two three-year USDA grants and we did this program for many years," Sarah says.

When that program was finished she continued doing some other coordination with HMI for the Northeast. "Some of the Certified Educators with HMI in this area were talking about how the agricultural service provider world (like Cornell Cooperative Extension and other Extension programs all up and down the northeastern states) was changing. The older people who were there, who had training in Holistic Management, were phasing out and other people were being hired," Sarah says. It was time to train a new crop of folks coming on.

"Some of the instructors who had been around for a long time, such as Phil Metzger, really wanted to see more of this happening. He is now retired but continues to teach Holistic Management. In talking with him, this idea for a new program came about—to see if we could get a SARE grant and do a three-year program. So I reached out to different ag service providers who had studied Holistic Management, but were now retired or finishing up their careers or changing their lives. They all talked about how it had been so helpful for them in their work," Sarah says.

Some of them, like Seth Wilner at the University of New Hampshire extension offices mentioned that some of these various agencies allow or encourage having this other tool (Holistic Management training and Whole Farm Planning) in their toolbox. "It was great to be able to connect with people who were doing some of this, and to reach out to them and ask if anyone they were working with would be interested in some in-depth training. They said yes! We received the NE SARE professional development grant, so here we are.

"We reached out to various ag support organizations all up and down the Northeast and received applications from ag technical service providers from Maine, New Hampshire, Pennsylvania, New York, Rhode Island, Connecticut, Massachusetts and West Virginia. I was very impressed with the amount of interest."

After the program began in 2017, which included residency programs as well as webinars—Sarah was leading support calls once a month. The group started out with 29 participants, and after a few months she realized it would be really useful to have mentors for them in addition to the support calls.

“I knew that in my own training it was very useful, and this is something that HMI tends to do—pair people up with mentors. So I reached out to a number of people I knew, who have skills in a variety of Holistic Management planning processes. I asked for four mentors so we could divide the group up, and had to get that approved through SARE as an addendum to my original grant proposal,” she explains.

“Some participants are working in groups, and some are working one on one with their mentor, and this is left up to what the mentor prefers or is most capable of doing, to help the participants.”

The instructors for this program, and people who instructed the classes are Phil Metzger, Sarah Williford, Crystal Stewart, Jean-Paul Courtens, Cindy Dvergsten, Larry Dyer and Seth Wilner. The mentors are Elizabeth Marks, Erica Frenay, Seth Wilner and Larry Dyer.

With the residency classes for this program, the group was together for 2 ½ days—though only once a year. “These were extremely productive sessions, with a lot of wonderful shared ideas regarding how to absorb the content, because this is a group of people who are looking at how to implement much of this into their own lives in order to practice it as well as use the tools in guiding and helping farmers,” she says.

“Many of the participants are in fields of ag service providing because they wholeheartedly support farming or are farmers themselves. Sometimes with the marketing piece or the business planning piece they can use their own real examples for learning purposes or they could choose from something they might dream of doing one day, or use one of the farmers they are working with, for examples,” she says.

“What’s great is that a lot of the communication and learning really happens in the sense of how to provide the information to farmers through their own knowledge, work and experience. The participants learned how to bring these tools into the skills they already have.

“It has been great, and I am really glad that we have the opportunity now to do some regional residency classes. Rather than everyone meeting in one place over the summer, we will be able to travel closer to the people up in Maine, for instance, who travelled 10 hours to get to the whole group residency. We can do something on one of the farms that they are working with.

“The same with Pennsylvania; we are organizing something there. We will be doing three to four sessions within the region closest to some of the participants. Then we will also do a couple different online deeper learning and review sessions for areas where people were feeling that they wanted to dive in deeper or become more prepared. That will be our wrap-up support effort.

“We will choose ways that work to have people remain in touch with each other, so they can feel supported, going on from here. I know that some of the participants started out with their own organizations supporting them, and then maybe a different director came in, or something changed organizationally, and they were no longer able to use their work time to be on a support call anymore. Figuring out how to support people

who have seen the benefits of this—but are not supported in their work place—is something we are trying to address.”

### **Ashley Pierce—New York**

Ashley Pierce, Livestock Educator in Capital Area Agriculture and Horticulture Program at Cornell University Cooperative Extension) was one of the 30 participants in this three-year program. “I already had some background in Holistic Management but not as in-depth as what we have been doing in class as part of this training program. Working with Sarah and the other educators has been wonderful. I have a great mentor, Elizabeth Marks, who is really pushing me to learn as much as I can. I’ve been doing a lot of work with her lately and she goes deeply into the material and has taught me a lot,” says Pierce.

Many of the people in this class are working individually with farmers, but Pierce chose instead to have a discussion group where the farmers she works with can get together periodically as a group. “We work on everything together. This has created a great little network of farmers in my area, and they seem to hold each other accountable, as well,” she says.

“In the winter we meet at one of our extension offices, but during the growing season and nicer weather we’ve been rotating around to meet at member farms or do field trips. At this point we have been through every farm and now we’re going to go back and do a follow-up visit on each farm.

“We talked about the four ecosystem processes and also invited folks from the Soil and Water Conservation District to come give a presentation so the farmers could learn more about the programs that are available to them in this area.”

In addition to teaching the farmers about Holistic Management, Ashley is trying to tie in some hands-on, boots-on-the-ground experiences, and show them more ways they can implement some of these practices. “In this particular instance, Soil and Water came and we walked around the farm and talked about the ecosystem processes and things that the Soil and Water folks could maybe do to help. For instance, they might be able to help a farmer with fencing or even just understanding their soils better,” she says.

“I might ask the farmer what the main obstacles are, on that particular farm, and then see how we can bring Holistic Management to help resolve those. Also, if there are some outside people who can bring more expertise to the situation, we invite them as well.”

One visit the group visited Carrie Edsal’s Black Willow Pond Farm near Cobleskill, New York where Carrie and her family raise pastured poultry, pork and lamb, and rabbits. She does direct marketing and also sells her meats through local farmer markets. Carrie spoke to the group about her grazing program.

Another visit the group toured Emaly Leak’s Autumn Hill Llamas and Fiber Farm near Duanesburg, New York. Emaly has been in the group for the whole two years. She has been raising llamas on that farm since 2017 and has had llamas since 2000.

Some of the farmers are beginners and Ashley feels it has been important and beneficial to help them create a larger network for support. “In the beginning a lot of them didn’t know what services were available, in addition to the Holistic Management information. This networking also allows them to meet other people in the area. Being able to help facilitate that has been important and helpful,” says Ashley.

“They have been such a great group, and working with them has taught me a lot more, going through this process—learning it and then relaying the information. In order to teach it, you need to have a better understanding of it yourself.”

Ashley also feels that the field trips have helped the beginning farmers learn about a variety of practices and enterprises. “We find people to visit who are doing interesting things, and making their systems work. They don’t always know that they are doing things holistically or saying that they have such-and-such holistic goal. They are not necessarily putting things in those terms, but they are working in that way—maybe informally. We visit some of those folks, and it’s good for my group of farmers to be able to see the final product, and visualize what they could be shooting for in their own situation,” she says.

As the NE SARE project draws to a close, Ashley hope she can continue working with these farmers, in different capacities. “I have been working a lot with Elizabeth Marks, to try to work toward becoming a Certified Educator because I now see the value in all of this,” she says.

“Everyone I talk to who practices Holistic Management sees it as a life-changing experience. I feel that this is true on the farm, but also in their lives and families. It has been a life-changing experience for me, and I think it will be that way for some of these farmers as well. I hope they will continue to get together to share ideas. That’s the great thing about Extension; we have a lot of great ideas and even if this specific program is finished, I think we could still have some kind of follow-up events and find ways to get together in the future.

“They have mentioned to me that getting together has been very energizing; it helps to share ideas with other people like yourself. There can be a lot of frustration in thinking you are the only one out there trying to do some of these things.”

While the group has been meeting 10 times a year, Ashley things that meeting quarterly is more sustainable for her given her farm and Extension job. “It’s been wonderful, and I’ve met so many great people, being a part of this. I feel it has been a very successful experiment.”

### **Jason Lilley—Maine**

Jason Lilley is a Sustainable Agriculture Professional for the University of Maine Cooperative Extension—Cumberland County) and also participated in the NE SARE program. “My primary role in the county office is to work directly with farmers to help them increase their financial and environmental sustainability and improve their production practices. More recently I’ve been working with the labor and social side of things, with farm management,” Jason says.

“When I started in this position, my background was in production practices, and all of the research that I ‘d done was on production systems. I had worked on various farms as a production manager and didn’t have much concept of the business and social side of farming. After being in this position for a few months, I quickly came to realize that the areas where farmers could benefit from the most—from educational opportunities—would be in social, managerial and financial management.

Jason found out about the NE SARE Program through an e-mail advertisement, asking for service providers to sign up. While he had the basic understanding of some of the content covered in the course, he feels that the program has really changed the way

that he approaches these topics when speaking with farmers about them. This experience has also changed his understanding of these topics, as well.

“We started in December of 2017. As part of the project we initially talked about expectations. We would meet with and develop holistic plans with four to five farmers. Many of us had some sort of direct contact with farmers; a lot of us have worked with three or four people through the course of this project. Some farmers are really open to this and ready to work with something new and go through the process, but some are less open to it and wonder why we are talking about things like values.”

Some of the participants in this project have successfully gone through the whole chronological process and helped farmers create a holistic goal or helped them with financial plans and not really told the farmers that this is a holistic viewpoint. “We’ve simply used those tools and the vantage points that we’ve learned from this training, and utilized them in how we approach this discussion,” Jason says.

Jason has found this program to have been very helpful for him as part of his professional development. “Sarah Williford, who led our group has done a fantastic job. It was great to be able to have that many different people in one room together--people who have all worked with farmers, often from different perspectives. There might be someone who only does financial management and benchmarking with farmers. Others are very much into the production side of it. In Maine we also have a beginning farmer network and we’ve been able to share some of those resources,” he says.

“Sarah and the project leadership team have done a really good job to support us. We have monthly calls with other people in the program who are doing similar work and working with similar types of farms. All of the calls are supported by people with experience in Holistic Management who can encourage us to keep up with it and to continue to reach out to the farmers—even though the farmers are busy and often not getting back to us.

“We’ve learned just as much from what is happening in other states as we have about the Holistic Management framework and how to utilize that viewpoint in our work. It has been an interesting project. A lot of the Holistic Management principles in many people’s minds have been associated with livestock grazing programs and large acreages, but here in the Northeast—especially where I am, and the people I work with—most farmers are very small. Many of them just have a diversified vegetable operation,” says Jason.

Some of these small farmers have become very creative, utilizing these educational resources and tweaking them to fit their own situation, to make them practical and useful for that small scale and type of operation. Some people still have the mistaken idea that holistic management is mainly just a grazing method and they don’t understand the full picture.

“Sometimes people are presented with a tool (like a certain type of program) and told that they need to plug their system into this, but that’s not what Holistic Management is all about. It’s more like a higher level of perspective and a way to think about your own operation.”

One of the groups he worked with is the Somali Bantu Community Association. “This is a group of new Americans, mainly refugees, who have come to me for help. Their director is from Somalia. They have a lot of farming background and knowledge from their home country in Somalia but this association has acquired some land and is

farming here. Now they have 150 people who are growing crops on either a commercial scale where they are pooling produce from each of their plots, or they are using it as a community garden to produce food for their own family,” Jason says.

“I have been working them and we’ve created a resource list that includes everything they have accessible to them. We have worked through the holistic goals and identified what the values are of the association. We have done a little bit of land planning and also dived into the communication side of things. There have been some issues with some of the landowners due to the cultural brokerage between them and the people they lease the land from.”

Jason also recently helped with a meeting of cut flower producers from all across the Northeast. This was a three-day program focused on business planning, financial perspectives, labor issues, etc. “I was able to utilize many of the tools that I received through the NE SARE training, for this program. It was the Flowering in the North Retreat at the Appalachian Mountain Club's Medawisla Lodge.”

At that retreat, 35 Cut Flower Producers came together to discuss the state of the industry and their individual businesses. “The participants were encouraged to develop their values statements during the first night of the retreat. Building off of that, the group spent three days discussing the strengths, weaknesses, opportunities, and challenges to their own operations and of the industry as a whole. They then dug into holistic financial planning and the current financial practices and status of their farms,” he says.

A big focus of this discussion was the importance of paying yourself a wage, as a farm owner, and setting plans for doing that comfortably. The group also discussed marketing and the potential for regional collaborative marketing, highlighting other successful models such as the Twin Cities Floral Exchange. “There was a lengthy discussion of work life balance and the difficulty of maintaining a healthy balance while running a farm and floral design business. The group developed a lengthy list of suggestions for setting boundaries and maintaining healthy relationships outside of work,” he says.

Initially some of the Holistic Management concepts may seem foreign to producers when first presented with them. But then they realize that Holistic Management is not some oddball thing but something very helpful and useful for their own operation. “We’ve been having some discussions about this,” says Jason. “There is a lot of terminology in the worksheets that we use, and in all the resources, that can be a little intimidating, such as for the people who are just gardening. We’ve discussed what situations might be appropriate to not even mention that this is Holistic Management, because that term in itself can turn some people off or scare them away. We just go through the practices and simply say that this is how you could look at this differently.”

#### **Stevie Schafnacker—Massachusetts**

Stevie Schafnacker is the Local Hero Program Coordinator for Community Involved in Sustaining Agriculture (CISA).

“CISA is a buy-local organization that is now in its 26<sup>th</sup> year. Geographically this region is small, but has more than 2000 farms—most of them doing direct marketing, but some are also doing small wholesale, or selling to restaurants or doing agri-tourism,” she says.

“My organization usually works with about 200 member farmers, but we also provide resources and assistance to many farmers who are not members. One of the

programs we offer is technical assistance for farmers who are members or non-members so we probably are in communication with about 400 farms at any given time. There are many gaps in expertise in our area, though more and more service providers are providing farm-related assistance in financial management and marketing, farm business management and planning expertise, production, land access, etc.”

Stevie applied to be part of the NE SARE program with the hope that the outcome would be developing deeper relationships with the farmers she works with, while providing a framework and opportunity to have ongoing relationships with farmers outside the program. She particularly assisted them with business decision-making.

“When I first went into this program I thought it was a structure for potentially a business and production plan, but what has come out of this has been much more,” says Stevie. “I have leaned on the Holistic Management principles of working toward a holistic goal and using the framework of decision-testing questions and monitoring—to really get down to what farmers need.

“In the process I have realized how much service providers can be sounding boards, and I’ve found this to be as crucial as any kind of technical expertise that we can give. The benefit of working one on one is that you can dive deeply into what that person’s biggest issue or logjam or opportunity might be, for their particular farm. I have done that, in some capacity, with all eight farms that I have been working with in this program.

“The strengths I have developed through this program permeate into my non-direct whole farm planning work as well. Rather than sitting down with the farmer and saying we are going to do Holistic Management and some elemental farm planning, I make sure that I spent at least two meetings in which the farmers understand those principles and practices as the platform for whatever work we do.

“We develop a holistic goal, run through what the decision-testing questions, and how you create an action plan and monitor those actions. Then I spend some time just getting to know the farm and the farmer in what seems like a casual way—so I can glean what that farm, farmer or farm family values are, and find out what is important to them. I learn about their history, what their long-term goals are, the state of their business and where they feel the pinch points are.”

Stevie has worked with one farm on pricing and how their cost of production would change with an enterprise they are transitioning. With another farmer she helped her with land planning and market planning. Yet with other farms she helps them with a SWOT (strengths, weaknesses, opportunities and threats) analysis.

On the actual farming end of it, this can be a very important and helpful step for many farmers to realize there are some options and doors that can open. “We do have service providers in our area who are able to give some direct financial record-keeping analysis or help in creating marketing plans, developing products and enterprises and production techniques and efficiencies but there are not very many people in our area who can help the farmer focus on the whole farm in making decisions in alignment with your values,” says Stevie. “This is something that I have been driven more toward, with HMI and whole-farm planning—which is more than land planning or business planning.”

These conversations are intimate discussions and she has learned a lot of people skills while doing these one on one meetings. “I am not sure if this is something that can be taught through Holistic Management, but it is very necessary--to build trust with the

people we work with—to provide individual assistance and not just cookie-cutter assistance,” says Stevie.

“It’s not just a business for them. It’s also someone’s life or legacy, their family members and relationships. It gets pretty intimate, very quickly. This is something that takes a certain amount of finesse and I am enjoying developing this skill.”

## **PHOTOS**

### **Ashley Pierce - farm group.jpg**

Ashley Pierce’s farm group during one of their almost monthly meetings which includes time for socializing.

### **Ashley Pierce pasture talk.jpg**

Carrie Edsall talking to the group about her grazing (on her Black Willow Pond Farm)

### **Jason Lilley—meeting.jpg**

Flowering in the North Retreat Participants at the Appalachian Mountain Club's Medawisla Lodge where Jason Lilley provided support in Holistic Financial Planning.

### **Jason Lilley—presentation.jpg**

Facilitators Carolyn Snell and Stacy Brenner discuss and categorize the strengths and opportunities, and weaknesses and challenges of the Northeast Cut Flower Industry.

### **Stevie.jpg**

Stevie Schafenacker

### **2019 wfp group selfie pic.jpg**

The 2019 Whole Farm Planning participants at one of their residential trainings.