

Whole Farm Planning Technical Assistance Guide

This guide is for service providers responding to requests for assistance.

- For Technical Assistance Providers
- For Extension Agents

How to use the guide

- 1) Identify the sections that apply to the farm and prepare yourself by reading through the questions, reading supporting information, and printing factsheets to leave with the farmer.
- 2) Before you go, download and print an aerial photo of the farm. This will help you make sure you are not missing any enterprise opportunities or resource concerns. It might be helpful to hand draw on the map important landmarks (such as, tunnel houses, fences, access roads, and fences) before or during the visit.
- 3) Bring someone with you to take notes on the farm walkthrough. This way one person can be focused on listening and interacting with the producer, while the other is focused on taking notes using this document.
- 4) During a farm walkthrough, make notes on each section.

Tips for Success

One of the most important factors in the success of a farm visit is whether the farmer believes you can and want to assist them. This trust is built over time, but a good first impression is essential. The first visit should be conversational and the farm story becomes the basis of the whole farm plan. As trust is built over time, you can ask more personal questions and they will offer more information.

- Assure them that you will not share their personal information with anyone. Some farmers will have concerns about regulations or taxes. They need to know that your only purpose there is to help provide the resources for them to reach their farm goals.

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Whole Farm Planning Technical Assistance Guide, Cont'd

- On the first visit, try to get a wholistic picture of the situation. Walking the land while you talk will help you get an idea of the resources available and if the farm goals are realistic. While you walk, ask:
 - What are the farm goals? What have they tried? What are the obstacles to reaching the goals?
 - Are there food security challenges? Can we suggest crops that will improve the household food security?
 - Are there kids on the farm? Are they part of the day-to-day activities? Are there challenges related to childcare, getting kids to school, or getting help with homework?
 - Do the operators work off the farm? Does that make it challenging to market what they produce?
- Always follow-up with anything you agreed to follow-up on. Your consistency in providing service shows them you are truly invested for the long run.
- Be on time for visits and don't take other calls during the visit. Demonstrating that you prioritize the time you have scheduled with them shows them their success is important to you.
- On the follow-up visits, be sure to reference the personal information in the "Listen to the whole story" section. Many times, these are the items that are of greatest concern to the family.

Land ownership and control is a primary consideration because it affects the farmers ability to make changes to the land, their willingness to invest in property improvements, and their ability to access USDA funds.

Questions to ask about land ownership:

- How did the farmers get to farm this property? Is it leased, was it bought, or was it inherited?
- Does the farm have an FSA Farm and Tract number so that they may be eligible for USDA programs?
- Are there any ownership or control issues that could prevent USDA applications? Is there a deed available to share with USDA?
- Are there any ownership or control issues that could pose future challenges if investment is made in the property?

Whole Farm Planning Technical Assistance Guide, Cont'd

- Can the property be used as collateral for infrastructure improvements or operating funds?
- Is there enough of the right kind of land available to implement the business plan?
- Encourage producers to ask for a receipt of service if they do not understand service provided by NRCS or FSA.

While the farmer does not have control over **surrounding land**, it is important to consider this as part of a whole farm plan. If unsightliness or contamination is coming from surrounding land, then mitigation strategies can be put in place to reduce the problem. For example, contamination from animal production areas could make water unfit for humans or animals to drink; or could be hazardous to use for irrigation. Establishing a woody buffer zone can help reduce runoff and wind spread from an animal production areas and make water safer.

Questions to ask about surrounding land:

- Are there any sources of nuisance or contamination coming from adjacent properties? For example, septic tank (no septic tank), livestock, or poultry. Federal regulations require that farmers protect fresh produce crops from sources of contamination.
- Is there an abundance of wildlife? Is the wildlife causing crop damage or is it a known source of human pathogens? Is effective fencing in place?
- What is the irrigation water source? Is it influenced by surrounding land? Has a water system assessment and/or testing for microbial contamination been conducted?

It is important to understand the **suitability of the land** for its intended use.

Sometimes a farmer may want to graze cattle on acreage too small to sustainably support a herd, or grow produce on a slope too steep to retain topsoil.

Understanding the land can help make sure the farmer uses the land in a way that will be sustainable over time. For example, grazing goats instead of cows on small acreage or planting fruit trees on a slope to prevent soil erosion from tilling.

Questions to ask about land suitability:

Whole Farm Planning Technical Assistance Guide, Cont'd

- Within the last year, is there a soil test report indicating organic matter, phosphorus, and potassium?
- Are crops/forage grasses appropriate for the land and soil? Are there weed or invasive species issues?
- Is the stocking capacity on target?
- Is rotational grazing in place? If the farmer rotates livestock through produce growing areas, are manure application to harvest intervals followed?
- What are the primary disease or pest challenges? Is there training that could address challenges?
- Are tools, equipment, or infrastructure needed to address production challenges?

Assessing the market is important to be able to make decisions that maximize profit.

Questions to ask about market assessment:

- What are the current and potential markets?
- Are training or certifications needed to reach new markets?
- Are tools, equipment, or infrastructure needed to reach new markets?

Enhancing the farming operation with **timber and wildlife** can produce an additional income stream.

Questions to ask about timber and wildlife:

- Is there a timber management plan?
- Is there income from ecotourism, or could there be? For example, hunting or birding. A farm rich in bird species can attract birders who will purchase farm products and pay to watch birds on the property. Find more information at alabamabirdingtrails.com.
- Are there endangered species on the property that must be conserved?

Business planning, record keeping, and tax expertise are essential to ensuring that the farming operation is financial sustainable. While you should know the basics of a Schedule F, encourage the farmer to seek professional guidance in this area.

Whole Farm Planning Technical Assistance Guide, Cont'd

Questions to ask about business planning, record keeping, and taxes:

- Does the farmer file a schedule F?
- Does the farm keep business records? How?
- Is there a business plan?
- Does the farm need loans to operate or to startup?
- Does the farm have an accountant for business planning and tax advice?
- Has the farm's legal structure been considered so that it meets the needs of the situation?
- Does the farm need a tax ID number for sales tax or employer's tax?
- Does the farm have or need liability insurance for on-farm events or food safety?

Recommended Training for Providing Technical Assistance to Small Diversified Farms

Make sure you have proper training to address grazing systems, forestry and wildlife, vegetable production, and commercial row crop production. It is not necessary to be an expert in all of these systems, but it is important to have basic knowledge in order to help and be able to connect the farmer with local experts. Having strong foundational knowledge related to a variety of farming practice, regulations, and conservation resources available. Courses to consider include:

- [Alabama Farming Basics Online Course](#)
- [Produce Safety Alliance Grower Training Course](#)
- [Small Fruit Certification Course](#)
- NRCS and FSA Program training is provided by USDA on request. Ask the local office for details.

Whole Farm Planning Technical Assistance Guide, Cont'd

Resources

- [Irrigation \(microirrigation system to include plasticulture\)](#)
- [Grazing systems for small ruminants](#)
- [Watering Livestock](#)
- [Checklist for New Farms \(usda.gov\)](#)
- [2013 Alabama Direct Farm Business Guide](#)
- [Agritourism Checklist](#)
- [National Organic Program | Agricultural Marketing Service \(usda.gov\)](#)

Resources to Bring with You for Producers

- [Small Farm Irrigation Factsheet](#)
- Pictures of practices

Land-grant Resources

- [Staff Directory - Alabama Cooperative Extension System \(AAMU and AU\)](#)
- [Faculty staff & Agents | Tuskegee University](#)

USDA FSA/NRCS

- [Home | NRCS Alabama \(usda.gov\)](#)

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