

## FARMER SELF-ASSESSMENT

(Adapted from a self-assessment tool developed by [New England Small Farm Institute](#))

HOW TO COMPLETE YOUR ASSESSMENT			
<b>Tasks</b> are the categories and chunks of work identified by a panel of successful farmers as what farmers actually do in the management of their farms.	<b>Can you perform this task?</b> Do you currently have this skill? Choose ‘Yes’, ‘No’, or if you’re <b>unsure</b> choose ‘?’	<b>Do you need training to learn this skill?</b> Do you need to learn more to be able to perform the task? Choose ‘Yes’, ‘No’, or if you’re <b>unsure</b> choose ‘?’	<b>Is acquiring this skill a priority for you?</b> Is this a skill you need to learn in order to begin and/or operate your farm business? Choose ‘Yes’, ‘No’, or if you’re <b>unsure</b> choose ‘?’

Task	Can you perform this task?			Do you need training?			Is acquiring this skill a priority?		
	YES	NO	?	YES	NO	?	YES	NO	?
<b>PLAN WHOLE FARM</b>									
Set whole <b>farm goals</b> (such as gather farm partners, family, and/or interested parties; set vision, mission statement, and economic, environmental, quality of life sustainability goals and farm/family priorities)									
Assess <b>available resources &amp; needs</b> (such as physical, capital, human; skills, experience, time, land, equipment, profitability, short and long-term owner’s draw)									
Conduct <b>market research</b> (such as research farm practice or value-added product, competition, markets/customers, production potential, marketing strategies)									
Select <b>enterprise(s)</b>									
Prepare <b>production plan</b> (such as process budgets, production potential, farm operations timeline, labor needs)									
Prepare <b>marketing plan</b> (such as pricing, marketing strategies, logo, product line, target customers, sales potential, promotion, product placement, labor needs, consumer trends, name, organic/”green” label options, potential for value-adding)									
Prepare <b>financial plan</b> (such as financial statements, annual budget, cash flow projections, whole farm budget, capitalization plan)									
Secure access to <b>land</b> (such as rent, lease, purchase)									
Assess <b>site</b> (such as map & analyze soils, topography, water, drainage, threats to natural resources, access, infrastructure, climate, and microclimate)									

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	YES	NO	?	YES	NO	?	YES	NO	?
<b>PLAN WHOLE FARM</b>									
Prepare <b>conservation &amp; land use plan</b> (such as research conservation programs & regulations; timeline & budgets for infrastructure development, conservation practices, irrigation/water projects; update maps)									
Research <b>legal requirements</b> (such as zoning, organizational structure, product handling, liability, tax abatement options, development rights)									
Assemble <b>whole farm plan</b> (such as timelines, budgets, labor, equipment, infrastructure, supply, and financial needs, roles, general business description, one year, five year, and long term plans)									

Task	Can you perform this task?			Do you need training?			Is acquiring this skill a priority?		
	YES	NO	?	YES	NO	?	YES	NO	?
<b>SET UP FARM BUSINESS</b>									
Obtain <b>financing</b> (such as raising funds from family, banks, others)									
Establish farm <b>legal structure</b> (such as sole proprietor, partnership, corporation, cooperative)									
Establish your farm <b>management team</b> (create management and professional job descriptions; hire lawyer, accountant, and others; hire non-labor employees; establish service contracts; conduct new employee orientation)									
Establish your <b>farm policies</b> (such as visitor, safety, personnel)									
Obtain necessary <b>licenses, permits &amp; certifications</b> (such as federal employer ID number, fuel storage, farm labor camp, tax exemption, organic certification, certified kitchen)									
Open business <b>bank accounts</b>									
Purchase liability & property <b>insurance</b>									
Establish credit with key <b>suppliers</b>									
Obtain necessary <b>office equipment &amp; supplies</b>									
Set up your <b>bookkeeping system</b> (such as cash journal, asset ledger, payables & receivables; by hand or on computer)									
Set up and maintain your <b>filing &amp; record-keeping systems</b>									
Provide for farm family <b>security</b> (such as purchase life & health insurance, establish retirement plan)									

Task	Can you perform this task?			Do you need training?			Is acquiring this skill a priority?		
	YES	NO	?	YES	NO	?	YES	NO	?
<b>MANGE FARM BUSINESS</b>									
Establish <b>tasks &amp; timelines</b> (such as administration, production, marketing)									
Manage <b>communications</b> (such as phone, fax, email, on-site messages, correspondence)									
Collect <b>payments</b>									
Pay <b>bills</b>									
Manage <b>payroll</b>									
Pay <b>taxes &amp; fees</b>									
Balance <b>checking accounts</b>									
Manage short & long term <b>debt</b>									
Take family living/owner's <b>draw</b>									
Keep <b>good records</b> (e.g. income, expenses, payroll)									
Adhere to federal, state & local <b>regulations</b> (such as sales tax & exemptions, workers compensation, payroll reporting)									

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	YES	NO	?	YES	NO	?	YES	NO	?
<b>PURSUE EDUCATION &amp; PROFESSIONAL DEVELOPMENT</b>									
Prepare plan to meet <b>skill &amp; information needs</b> (such as goals, timeline, budget)									
<b>Apprentice</b> to experienced farmer									
Find a farmer- <b>mentor</b>									
<b>Observe</b> your farm daily									
<b>Read</b> agricultural literature (such as books, journals, catalogs)									
<b>Visit</b> other farms									
Establish <b>relationships</b> with local institutions & organizations									
Attend <b>classes, conferences, workshops &amp; trade shows</b>									
Consult with local <b>experts</b>									
Maintain dialogue with <b>customers</b>									
<b>Learn from experience</b> (frequently compare actual outcomes to farm plan and adjust day-to-day operations accordingly)									

Task	Can you perform this task?			Do you need training?			Is acquiring this skill a priority?		
	YES	NO	?	YES	NO	?	YES	NO	?
<b>CARE FOR FAMILY &amp; COMMUNITY RELATIONS</b>									
Set aside time for your <b>family &amp; yourself</b>									
Establish friendly relations with your <b>neighbors</b>									
Participate in <b>community</b> organizations & activities									
Maintain an attractive <b>farmstead</b>									
Host community events & farm <b>tours</b>									
Patronize <b>local businesses</b>									
Establish <b>cooperative relationships</b> with other farmers, businesses organizations									
Promote sustainable, local farming & food system security									

Task	Can you perform this task?			Do you need training?			Is acquiring this skill a priority?		
	YES	NO	?	YES	NO	?	YES	NO	?
<b>MANAGE FARM LABOR</b>									
Prepare <b>farm labor</b> plan (such as self, family, hired [H2A, apprentices, interns], volunteer, CSA work-share)									
Create clear and comprehensive <b>job descriptions</b>									
Fill out necessary state & federal <b>labor forms</b>									
<b>Recruit</b> labor									
Establish labor <b>contracts</b>									
Conduct <b>farm orientation</b> including health and safety issues, 'where things are', etc.									
Assign <b>daily tasks</b>									
<b>Train</b> farm workers in field work, efficiency, equipment safety									
<b>Supervise</b> farm workers including communication, motivation, and resolving disputes									
Adhere to all <b>state and federal labor laws</b> including employment laws about fair wages, workers' comp, unemployment, equal opportunity, sexual harassment, non-discrimination; state and local farm property and general liability; risk management									
<b>Keep good records</b> including time sheets, labor reports, and records of disputes and injuries.									

Task	Can you perform this task?			Do you need training?			Is acquiring this skill a priority?		
	YES	NO	?	YES	NO	?	YES	NO	?
<b>MANAGE TOOLS, EQUIPMENT, AND SUPPLIES</b>									
<b>Inventory</b> tools, equipment & supplies									
Acquire necessary <b>tools, equipment &amp; supplies</b> (such as purchase, borrow, rent)									
<b>Fabricate</b> tools & equipment									
Establish preventive <b>maintenance</b> schedule for tools & equipment									
Establish parts & supplies <b>inventories</b> (including scrap pile)									
<b>Monitor</b> condition of tools & equipment									
<b>Maintain</b> tools & equipment									
<b>Repair</b> tools & equipment									
Provide storage for tools, equipment & supplies									
<b>Store tools, equipment &amp; supplies</b> (such as safely, in good order)									
Get rid of <b>unneeded tools &amp; equipment</b> (selling or giving away)									
<b>Keep good records</b> (equipment manuals, repair records, expenses, capital repairs, future problems/needs)									

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	YES	NO	?	YES	NO	?	YES	NO	?
<b>MANAGE FARM INFRASTRUCTURE (GROUNDS, FARMHOUSE, UTILITIES, ROADS, SHEDS, SHIP, FENCE LINE, DITCHES, BARN, IRRIGATION SYSTEMS, GREENHOUSES)</b>									
Adhere to <b>federal, state &amp; local legal &amp; regulatory requirements</b> (such as zoning, permits, building codes, fuel & pesticide storage)									
Build/ install <b>infrastructure</b>									
Create and post farm <b>signage</b> (such as promotional, safety, traffic)									
Establish <b>preventive maintenance</b> schedule for infrastructure									
<b>Establish</b> parts & supplies inventory									
<b>Monitor</b> condition of infrastructure									
<b>Maintain</b> infrastructure									
<b>Repair</b> infrastructure (such as emergency, seasonal, annual)									
<b>Demolish unnecessary infrastructure</b> including salvage and recycling									
<b>Keep good records</b> (such as plans of land, “as-builts”, expenses, capital repairs, future problems/needs)									

Task	Can you perform this task?			Do you need training?			Is acquiring this skill a priority?		
	YES	NO	?	YES	NO	?	YES	NO	?
<b>MARKET FARM PRODUCTS &amp; SERVICES</b>									
Plan <b>pricing and sales strategies</b> for on-farm sales, farmers' markets, retail & wholesale sales; value added products									
Monitor <b>market conditions</b> (such as price, supply, competition, and consumer trends)									
Develop <b>promotional materials</b>									
<b>Promote</b> farm products & services (such as advertise, participate in "buy local" or "green label" campaigns)									
Obtain necessary <b>supplies</b> (such as scales, receipt books, cash box, packaging, labels)									

Task	Can you perform this task?			Do you need training?			Is acquiring this skill a priority?		
	YES	NO	?	YES	NO	?	YES	NO	?
<b>REVIEW WHOLE FARM PLAN</b>									
Prepare <b>year-end financial statements</b> , tax returns & reports									
<b>Review whole farm plan</b> (such as goals & needs, production, land, financial & marketing plans)									
<b>Review/analyze all farm records</b> (compare projections to results, budgets-to-actuals, crop yields, financials, environmental impact; compare actual profitability with profitability projections, goals, and needs.)									
<b>Revise whole farm plan</b> as needed (refer to <i>Plan Whole Farm</i> tasks)									
<b>Develop annual plan</b> for coming year (refer to <i>Plan Whole Farm</i> tasks)									

Send your Farmer Self-Assessment **AND** your [Application for Farm Business Development Assistance](#) to:

Maine Farmland Trust / Farm Business Development / 97 Main Street, Belfast, ME 04915

or

[esprague@mainefarmlandtrust.org](mailto:esprague@mainefarmlandtrust.org)

or

fax to 207-338-6024