

**NORTHEAST SMALL SCALE, “SUSTAINABLE” FARMER
SKILL SELF-ASSESSMENT TOOL**

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Task Statements These are the <i>duties</i> (categories of work) and <i>tasks</i> (discrete chunks of work) identified by a panel of successful farmers as what farmers actually do in the management of their farms.	Can you perform this task? Do you currently have this skill: circle yes, no, or ? (for unsure).	Do you need to learn more to be able to perform the task? Do you need training to learn this skill: circle yes, no, or ? (for unsure).	Is acquiring this skill a priority? Is this a skill you need to learn to begin and/or operate your farm business? circle yes, no, or ? (for unsure).
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Task Statements	Can you perform this task?	Do you need training?	Is acquiring this skill a priority?
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Duty A: PLAN WHOLE FARM

1. Set whole farm goals (e.g. gather farm partners, family, and/or interested parties; set vision, mission statement, 3-part sustainability goals and farm/family priorities [economic, environmental, quality of life])	yes no ?	yes no ?	yes no ?
2. Assess available resources & needs (e.g. physical, capital, human; skills, experience, time, land, equipment, profitability, short and long-term owner’s draw)	yes no ?	yes no ?	yes no ?
3. Conduct market research (e.g. research industry, competition, markets/customers, production potential, marketing strategies)	yes no ?	yes no ?	yes no ?
4. Select enterprise(s)	yes no ?	yes no ?	yes no ?
5. Prepare production plan (e.g. process budgets, production potential, farm operations timeline, labor needs)	yes no ?	yes no ?	yes no ?
6. Prepare marketing plan (e.g. 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)	yes no ?	yes no ?	yes no ?
7. Prepare financial plan (e.g. financial statements, annual budget, cash flow projections, whole farm budget, capitalization plan)	yes no ?	yes no ?	yes no ?
8. Secure access to land (e.g. rent, lease, purchase)	yes no ?	yes no ?	yes no ?
9. Assess site (e.g. map & analyze: soils, topography, water, drainage, threats to natural resources, access, infrastructure, climate and microclimate)	yes no ?	yes no ?	yes no ?
10. Prepare conservation & land use plan (e.g. research conservation programs & regulations; timeline & budgets for: infrastructure development, conservation practices, irrigation/water projects; update maps)	yes no ?	yes no ?	yes no ?
11. Research legal requirements (e.g. zoning, organizational structure, product handling, liability, tax abatement options, development rights)	yes no ?	yes no ?	yes no ?
12. Assemble whole farm plan (e.g. timelines, budgets, labor, equipment, infrastructure, supply, and financial needs, roles, general business description, one year, five year, and long term plans)	yes no ?	yes no ?	yes no ?

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Duty B: SET UP FARM BUSINESS			
1 Obtain necessary financing (e.g. family, banks, others)	yes no ?	yes no ?	yes no ?
2. Establish farm legal structure (e.g. sole proprietor, partnership, corporation, cooperative)	yes no ?	yes no ?	yes no ?
3. Establish farm management team (e.g. create management and professional job descriptions; hire lawyer, accountant, and others; hire non-labor employees; establish service contracts; conduct new employee orientation)	yes no ?	yes no ?	yes no ?
4. Establish farm policies (e.g. visitor, safety, personnel)	yes no ?	yes no ?	yes no ?
5. Obtain necessary licenses, permits & certifications (e.g. federal employer ID#, fuel storage, farm labor camp, tax exemption, organic certification, certified kitchen)	yes no ?	yes no ?	yes no ?
6. Open business bank accounts	yes no ?	yes no ?	yes no ?
7. Purchase liability & property insurance	yes no ?	yes no ?	yes no ?
8. Establish credit with key suppliers	yes no ?	yes no ?	yes no ?
9. Obtain necessary office equipment & supplies	yes no ?	yes no ?	yes no ?
10 Set up bookkeeping system (e.g. cash journal, asset ledger, payables & receivables; by hand or on computer)	yes no ?	yes no ?	yes no ?
11. Set up filing & record-keeping systems	yes no ?	yes no ?	yes no ?
12. Provide for farm family security (e.g. purchase life & health insurance, establish retirement plan)	yes no ?	yes no ?	yes no ?

Task Statements	Can you perform this task?	Do you need training?	Is acquiring this skill a priority?
Duty C: MANAGE FARM BUSINESS			
1. Establish tasks & timelines (e.g. administration, production, marketing)	yes no ?	yes no ?	yes no ?
2. Manage communications (e.g. phone, fax, email, on-site messages, correspondence)	yes no ?	yes no ?	yes no ?
3. Collect payments	yes no ?	yes no ?	yes no ?
4. Pay bills	yes no ?	yes no ?	yes no ?
5. Manage payroll	yes no ?	yes no ?	yes no ?
6. Pay taxes & fees	yes no ?	yes no ?	yes no ?
7. Balance checking account(s)	yes no ?	yes no ?	yes no ?
8. Monitor cash flow	yes no ?	yes no ?	yes no ?
9. Manage short & long-term debt	yes no ?	yes no ?	yes no ?
10. Take family living/owner's draw	yes no ?	yes no ?	yes no ?
11. Keep good records (e.g. income, expenses, payroll)	yes no ?	yes no ?	yes no ?
12. Adhere to federal, state & local regulations (e.g. sales tax & exemptions, workers compensation, payroll reporting)	yes no ?	yes no ?	yes no ?

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Duty D: PURSUE EDUCATION & PROFESSIONAL DEVELOPMENT

1. Prepare plan to meet skill & information needs (e.g. goals, timeline, budget)	yes no ?	yes no ?	yes no ?
2. Apprentice to experienced farmer	yes no ?	yes no ?	yes no ?
3. Find farmer-mentor	yes no ?	yes no ?	yes no ?
4. Observe your farm <i>daily</i>	yes no ?	yes no ?	yes no ?
5. Read agricultural literature (e.g. books, journals, catalogs)	yes no ?	yes no ?	yes no ?
6. Visit other farms	yes no ?	yes no ?	yes no ?
7. Establish relationships with local institutions & organizations	yes no ?	yes no ?	yes no ?
8. Attend classes, conferences, workshops & trade shows	yes no ?	yes no ?	yes no ?
9. Consult with local experts	yes no ?	yes no ?	yes no ?
10. Dialogue with customers	yes no ?	yes no ?	yes no ?
11. Keep posted on current events & trends	yes no ?	yes no ?	yes no ?
12. Learn from experience (e.g. frequently compare actual outcomes to farm plan and adjust day-to-day operations accordingly)	yes no ?	yes no ?	yes no ?

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Duty E: NOURISH FAMILY & COMMUNITY RELATIONS

1. Set aside time for family & self	yes no ?	yes no ?	yes no ?
2. Establish friendly relations with neighbors	yes no ?	yes no ?	yes no ?
3. Participate in community organizations & activities	yes no ?	yes no ?	yes no ?
4. Maintain an attractive farmstead	yes no ?	yes no ?	yes no ?
5. Host community events & farm tours	yes no ?	yes no ?	yes no ?
6. Patronize local businesses	yes no ?	yes no ?	yes no ?
7. Establish cooperative relationships with other farmers, businesses & organizations	yes no ?	yes no ?	yes no ?
8. Promote sustainable, local farming & food system security	yes no ?	yes no ?	yes no ?

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Duty F. MANAGE FARM LABOR RESOURCES

1. Prepare farm labor plan (e.g. self, family, hired [H2A, interns, other], volunteer, CSA work-share)	yes no ?	yes no ?	yes no ?
2. Create job descriptions (e.g. clear & comprehensive)	yes no ?	yes no ?	yes no ?
3. Fill out any necessary state & federal labor forms	yes no ?	yes no ?	yes no ?
4. Recruit labor	yes no ?	yes no ?	yes no ?
5. Establish labor contracts	yes no ?	yes no ?	yes no ?
6. Conduct farm orientation (e.g. health & safety issues, “where things are”)	yes no ?	yes no ?	yes no ?
7. Assign daily tasks	yes no ?	yes no ?	yes no ?

8. Train farm workers (e.g. fieldwork, efficiency, equipment safety)	yes	no	?	yes	no	?	yes	no	?
9. Supervise farm workers (e.g. communicate, motivate, resolve disputes)	yes	no	?	yes	no	?	yes	no	?
10. Adhere to all state & federal labor regulations (e.g. state and federal employment law [fair wage, workers' compensation, unemployment, equal opportunity, sexual harassment, etc.]; state and local farm property tax abatements programs; volunteer protection; product and general liability; risk management)	yes	no	?	yes	no	?	yes	no	?
11. Keep good records (e.g. time sheets, labor reports, records of disputes & injuries)	yes	no	?	yes	no	?	yes	no	?

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Duty G. MANAGE TOOLS, EQUIPMENT & SUPPLIES

1. Inventory tools, equipment & supplies	yes	no	?	yes	no	?	yes	no	?
2. Acquire necessary tools, equipment & supplies (e.g. purchase, borrow, rent)	yes	no	?	yes	no	?	yes	no	?
3. Fabricate tools & equipment	yes	no	?	yes	no	?	yes	no	?
4. Establish preventive maintenance schedule for tools & equipment	yes	no	?	yes	no	?	yes	no	?
5. Establish parts & supplies inventories (including scrap pile)	yes	no	?	yes	no	?	yes	no	?
6. Monitor condition of tools & equipment	yes	no	?	yes	no	?	yes	no	?
7. Maintain tools & equipment	yes	no	?	yes	no	?	yes	no	?
8. Repair tools & equipment	yes	no	?	yes	no	?	yes	no	?
9. Provide storage for tools, equipment & supplies	yes	no	?	yes	no	?	yes	no	?
10. Store tools, equipment & supplies (e.g. safely, in good order)	yes	no	?	yes	no	?	yes	no	?
11. Get rid of unneeded tools & equipment (e.g. sell, give away)	yes	no	?	yes	no	?	yes	no	?
12. Keep good records (e.g. equipment manuals, repair records, expenses, capital repairs, future problems/needs)	yes	no	?	yes	no	?	yes	no	?

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Duty H. MANAGE FARM INFRASTRUCTURE (e.g. grounds, farmhouse, utilities, roads, sheds, shop, fence line, ditches, barns, irrigation systems, greenhouses)

1. Adhere to federal, state & local legal & regulatory requirements (e.g. zoning, permits, building codes, fuel & pesticide storage)	yes	no	?	yes	no	?	yes	no	?
2. Build/ install infrastructure	yes	no	?	yes	no	?	yes	no	?
3. Create farm signage (e.g. promotional, safety, traffic, posting)	yes	no	?	yes	no	?	yes	no	?
4. Establish preventive maintenance schedule for infrastructure	yes	no	?	yes	no	?	yes	no	?
5. Establish parts & supplies inventory	yes	no	?	yes	no	?	yes	no	?
6. Monitor condition of infrastructure	yes	no	?	yes	no	?	yes	no	?
7. Maintain infrastructure	yes	no	?	yes	no	?	yes	no	?
8. Repair infrastructure (e.g. emergency, seasonal, annual)	yes	no	?	yes	no	?	yes	no	?
9. Demolish unnecessary infrastructure (including salvage & recycling)	yes	no	?	yes	no	?	yes	no	?
10. Keep good records (e.g. plans of land, "as-builts", expenses, capital repairs, future problems/needs)	yes	no	?	yes	no	?	yes	no	?

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Duty I: MANAGE PRODUCTION & NATURAL RESOURCES

1. Implement conservation practices & measures (e.g., buffer strips, water quality management projects, wildlife habitat improvement, strip cropping)	yes no ?	yes no ?	yes no ?
2. Test soil & water	yes no ?	yes no ?	yes no ?
3. Build soil health & productivity (e.g., make compost, plant and manage cover and catch drops, integrate crop and livestock production, install crop rotations, add organic amendments if and as required)	yes no ?	yes no ?	yes no ?
4. Obtain necessary supplies & inputs	yes no ?	yes no ?	yes no ?
5. Monitor weather	yes no ?	yes no ?	yes no ?
6. Manage pests (e.g. insects, diseases, parasites, weeds, critters, predators; provide habitat for beneficials)	yes no ?	yes no ?	yes no ?
7. Manage crop & livestock rotations	yes no ?	yes no ?	yes no ?
8. Conduct trials of new breeds, crops, products & techniques	yes no ?	yes no ?	yes no ?
9. Monitor ecological impact of all production activities	yes no ?	yes no ?	yes no ?
10. Manage crop residues & other farm by-products (e.g. compost)	yes no ?	yes no ?	yes no ?
11. Custom hire farm services	yes no ?	yes no ?	yes no ?
12. Adhere to federal, state & local regulations	yes no ?	yes no ?	yes no ?
13. Keep good records (e.g. inputs, soil health, weather, pests)	yes no ?	yes no ?	yes no ?

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Duty J. RAISE LIVESTOCK

1. Prepare annual livestock & animal products production plan (e.g. stocking, rotation, feeding & grazing, health, production goals)	yes no ?	yes no ?	yes no ?
2. Obtain stock (e.g. produce on farm, buy in)	yes no ?	yes no ?	yes no ?
3. Provide stock with appropriate housing, shelter & protection from predators	yes no ?	yes no ?	yes no ?
4. Establish flock or animal ID system	yes no ?	yes no ?	yes no ?
5. Assess animal nutrient needs	yes no ?	yes no ?	yes no ?
6. Establish grazing plan	yes no ?	yes no ?	yes no ?
7. Manage pastures	yes no ?	yes no ?	yes no ?
8. Obtain feed & supplements (e.g. produce, buy in)	yes no ?	yes no ?	yes no ?
9. Balance feed rations	yes no ?	yes no ?	yes no ?
10. Feed & water animals	yes no ?	yes no ?	yes no ?
11. Monitor animal health & well-being	yes no ?	yes no ?	yes no ?
12. Meet all animal health & veterinary needs	yes no ?	yes no ?	yes no ?
13. Manage manure & livestock mortalities	yes no ?	yes no ?	yes no ?
14. Harvest animal products (e.g. milk, eggs, fleece, honey)	yes no ?	yes no ?	yes no ?
15. Slaughter meat animals	yes no ?	yes no ?	yes no ?

16. Perform post-harvest handling & processing tasks (e.g. pasteurize, bottle, wash, process, butcher, package, freeze, store)	yes	no	?	yes	no	?	yes	no	?
17. Add value to animal products if required by marketing plan	yes	no	?	yes	no	?	yes	no	?
18. Adhere to federal, state & local regulations (e.g. slaughtering & processing, manure)	yes	no	?	yes	no	?	yes	no	?
19. Keep good records (e.g., herd or flock ID numbers, purchase and sales, production, general health, feed & supplements, breeding, processing, treatments [parasite control, medications, physical i.e. dehorning])	yes	no	?	yes	no	?	yes	no	?

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Duty K: RAISE CROPS

1. Prepare annual crop production plan (e.g. planting schedule, crop rotation, soil fertility, application of inputs, harvest dates, production goals)	yes	no	?	yes	no	?	yes	no	?
2. Obtain seeds & plant materials (e.g. produce on farm, buy in)	yes	no	?	yes	no	?	yes	no	?
3. Prepare soil (e.g. greenhouse or field, tillage or no-till, beds or rows)	yes	no	?	yes	no	?	yes	no	?
4. Plant crops (e.g. seed, transplants, rootstock, slips)	yes	no	?	yes	no	?	yes	no	?
5. Care for growing plants (e.g. transplant, mulch, prune, trellis, cover, stake)	yes	no	?	yes	no	?	yes	no	?
6. Fertilize crops (e.g. foliar, side-dress)	yes	no	?	yes	no	?	yes	no	?
7. Irrigate crops	yes	no	?	yes	no	?	yes	no	?
8. Cultivate soil	yes	no	?	yes	no	?	yes	no	?
9. Harvest crops	yes	no	?	yes	no	?	yes	no	?
10. Perform post-harvest handling & processing (e.g. wash, trim, pack, cool, store)	yes	no	?	yes	no	?	yes	no	?
11. Add value to crops if required by marketing plan	yes	no	?	yes	no	?	yes	no	?
12. Adhere to federal, state & local regulations (e.g. APHIS, pesticide regulations)	yes	no	?	yes	no	?	yes	no	?
13. Keep good records (e.g. planting & harvest dates, inputs, yields, crop health, field plan “actuals”, sales)	yes	no	?	yes	no	?	yes	no	?

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Duty L: MARKET FARM PRODUCTS AND SERVICES

1. Prepare annual/seasonal marketing plan (e.g. marketing strategies, sales outlets [on-farm, farmers’ markets, retail, wholesale], pricing, value adding).	yes	no	?	yes	no	?	yes	no	?
2. Monitor market conditions (e.g. price, supply, competition, consumer trends)	yes	no	?	yes	no	?	yes	no	?
3. Develop promotional materials	yes	no	?	yes	no	?	yes	no	?
4. Promote farm products & services (e.g. advertise, participate in “buy local” or “green label” campaigns)	yes	no	?	yes	no	?	yes	no	?
5. Obtain necessary supplies (e.g. scales, receipt books, cash box, packaging, labels)	yes	no	?	yes	no	?	yes	no	?
6. Contact buyers (e.g. retail and/or wholesale)	yes	no	?	yes	no	?	yes	no	?

7. Sell farm products & services	yes no ?	yes no ?	yes no ?
8. Distribute farm products (e.g. deliver, ship)	yes no ?	yes no ?	yes no ?
9. Obtain customer feedback	yes no ?	yes no ?	yes no ?
10. Adhere to federal, state & local regulations (e.g. sales tax & exemptions, weights & measures)	yes no ?	yes no ?	yes no ?
11. Keep good records (e.g. customer comments, competition, price changes, sales, promotional activities)	yes no ?	yes no ?	yes no ?

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Duty M: REVIEW & RE-PLAN WHOLE FARM

1. Prepare year-end financial statements, tax returns & reports	yes no ?	yes no ?	yes no ?
2. Review whole farm plan (e.g. goals & needs, production, land, financial & marketing plans)	yes no ?	yes no ?	yes no ?
3. Review/analyze all farm records (e.g. compare projections to results, budgets-to-actuals, crop yields, financials, environmental impact; compare actual profitability with profitability projections, goals, and needs.)	yes no ?	yes no ?	yes no ?
4. Revise whole farm plan as needed (see Duty A)	yes no ?	yes no ?	yes no ?
5. Develop annual plan for coming year (see Duty A)	yes no ?	yes no ?	yes no ?