

## 2. Clarifying Objectives & Defining Contexts

### What is Holistic Management?

Holistic Management is a framework created by Allan Savory ([www.savory.global](http://www.savory.global)) There are different parts to Holistic Management, which can make it hard to grasp initially.

#### Decision Making

Holistic Management is primarily a **decision-making framework** that ensures we consider our core values across the board and make decisions that will not lead to unintended consequences. Holistic decision-making is just as applicable to an individual as it is to a family or business.

First you must define the “whole under management” which becomes the foundation of what is called your Holistic Context. You are defining what you are managing. You need to define what your deepest values are within their Holistic Context. By asking what you really want for your life and continuously digging deeper into that, the process of clarification begins. Once we have developed our unique Holistic Context then we can test decisions we make (using the Testing Questions) to ensure we are continually moving towards the fruition of our Holistic Context.

#### Holistic Management Tools

Many people first encounter Holistic Management in relation to livestock grazing. Holistic Planned Grazing, Financial and Land Planning are the main components of Holistic Management. These are built upon key insights developed over Allan Savory's career work.

#### Four Ecosystem Processes

When the Four Ecosystem Processes are healthy, the ecosystem will be abundant, sustainable, and constantly improving. When they are unhealthy, the ecosystem will be degrading, become unsustainable and unproductive. These four processes help land managers address the root causes of the problems in their ecosystems and attain the fastest and longest-lasting results:

- **Water Cycle:** Bare soil is the primary cause of a broken water cycle and the only cause of desertification around the

planet. Cover your soil with living plants and litter. We need to observe how rainfall is being absorbed quickly into the soil. Water is life, and therefore a very permanent aspect in design.

- **Mineral Cycle:** Life and death are two sides of the same coin. Decay equals fertility in that minerals are constantly being recycled from dead organism to living organism. Microorganisms are the primary movers of the mineral cycle.
- **Community Dynamics:** Succession is the pattern of change in ecological communities over time. Biodiversity will increase or decrease through our management and actions. If we observe natural systems, we generally see that the more diverse an ecosystem is, the more stable it tends to be.
- **Energy Flow:** All life is powered by the sun. How efficiently we harvest that fleeting light on our land is directly linked to our success as well as the enhancement of all the above processes.

**Planned Grazing:** Holistic planned grazing is the result of Allan Savory's pioneering work combatting desertification. Over 35% of the earth's surface is grassland, and it is estimated that over 70% of this land is degraded. Properly managed livestock mimicking the predator/prey relationships in which these environments evolved can restore this degradation. Planning grazing revolves around managing the time animal's will stay in a particular area, and timing how long the land needs to rest before it can be grazed again. The whole planning process builds upon ensuring grass plants are not overgrazed, in order to build topsoil rather than deplete it.

**Financial Planning:** Farms must be run profitably. Holistic Financial Planning ensures we end up where we designed our business to go, while also taking into account your personal non-monetary objectives. Profit ultimately allows us to achieve some aspects of the quality of life we desire. Financial planning (as well as making time to plan) are often the biggest limiting factors in farms and projects I have visited.

**Land Planning:** The Holistic Land Planning element is similar in many ways to Permaculture and other land-based ecological design approaches.

## Holistic Management Decision-Making

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For some years now, we have integrated Holistic Management and Keyline Design into our Permaculture work, finding it very beneficial to draw from all of these approaches. Whilst Permaculture really focuses in on the design process, Keyline planning afforded us a very clear and solid organising pattern suited to the design of wider landscapes. Likewise, Holistic decision-making adds an effective decision-making and management process we found missing previously. We attribute much of the rapid implementation and success of our farm to this. It can dramatically increase the success of Permaculture projects everywhere. This is also visible with regards to the financial planning aspect, as there are startlingly few examples of thriving Permaculture farms, especially in Europe. Combine this with the powerful tools of Holistic Planned Grazing for land regeneration on broad scale, especially in brittle climates (drylands), and the other valuable insights into the way ecosystems function and we have a very whole and powerful design approach in our hands. It is worth noting that Holistic Management is already practised on a huge land base (over 15M Ha) across 5 continents, and is respected by farmers and land managers in a way that Permaculture is often not. (On my travels I have witnessed the local perception of Permaculture Design as wildly variable between both ends of the spectrum, as it were.)

### Defining your Context

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Permaculture Design has never really had a super clear decision-making matrix. My own experience of visiting projects and properties in different countries has led me to understand that it is the management/decision-making and financial planning that is usually a limiting factor to success. In contrast it is nearly always possible to find resources, people with the right skills, etc. This is where we bring in Holistic Management as a way to empower Permaculture at the farm scale. As everything we are managing when running a farm for profit is complex by nature, we need this.

If we look at all the tools we create, our technology, we find we achieve our simple day-to-day objectives with amazing success. From wooden clubs and flint tools through to computers and space travel. These things are all complicated, but not complex. Also known as hard systems, they can be defined as:

- Complicated
- Doing what they are designed to do
- Have no unexpected emergent properties
- Not self-organising
- When problems arise they are relatively easy to solve

If we look at the things we manage (e.g., agriculture, ecology, economies), we find we are running into exponentially aggravated problems. Problems such as we are experiencing with global economies, governance & agriculture. These things are defined in systems science as soft or natural systems;

- Complex
- Self-organising (self (re)organising)
- Have emergent properties and feedback loops
- When problems arise, they are extremely difficult to solve

Nature functions in a whole system. The notions of isolated or individual parts are mechanical concepts. When we make decisions involving complexity, it is to be expected that we will face unintended consequences, regardless of how well-intended and designed our solutions may have been.

What Allan Savory has put forth is that the solution lies within the problem; the context for objectives in management cannot be simple if objectives are to be achieved without unintended consequences. We are constantly bombarded with notions that 'organic' and 'free-range' are the answers to all kinds of problems. But if we stop to think for a short moment we see that organic production, grass-fed animals and natural fertilisation cycles are all people had for the last 10,000 years of agriculture. And yet we created most of the bare soil that covers two thirds of the world surface today. A couple dozen civilizations in history wiped themselves off the planet by destroying their soil resources. Clearly it is management, not strategies and tools, that are lacking.

Today agriculture produces 20 times more eroding soil than food; in fact it is the most destructive and polluting industry on the planet. About 10 tons of topsoil is lost per person/per year on the planet to supply a global supply chain with largely poor value food. The work of the Savory Institute is known to most people in relation to grazing of livestock, where its work focuses primarily on the seasonal rainfall areas of the world.

Here the accelerating desertification expresses symptoms of increased poverty, floods and droughts, social breakdown, emigration and violence. However, Holistic Management is primarily a Decision Making Framework, or matrix if you will.

I believe this approach is a strong element of what has allowed us to roll so effectively here at Ridgedale, and something I would strongly recommend others to follow. Below the steps necessary to begin this process are outlined and then our Holistic Context is shared as an example.

Holistic Management is framed around the Four Key Insights (and an additional Ten Principles), the Whole Under Management and the Holistic Context. Whilst Holistic Management is presented primarily for farms and ranches (particularly the Grazing Planning and Financial Planning aspects), it is equally relevant for any regenerative enterprise or group making common decisions. For us the Holistic Context replaces the Goal Setting phases in Permaculture Design. It helps greatly with our design work for others too. If someone has clearly defined their Context for themselves it is a lot easier to assist them. When we hold Holistic Management trainings we have found a few common limiting factors for people getting this down on paper;

- Lack of familiarity with this sort of process
- Lack of time
- Needing things to 'look' a particular way
- Unable to define the value or need being addressed by taking specific actions

### **Define the Whole Under Management**

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- Define: who the Decision Makers are
- Who has veto power?

### **Define your Resource Base**

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- Can you define all the resources/ assets you own or work with?
- This may include resources you do not own but are available to you
- We personally found the 8 Forms of Capital ([www.8forms.org](http://www.8forms.org)) is a great way to structure this.

### **Define the Sources of Money**

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- Note all the sources of existing money/ debt

- Could be from various enterprises, work, shares, grants, subsidies and so forth
- This can include money that can be generated from the physical resources listed above

### **Define your Statement of Purpose**

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- If you have a property/ enterprise can you sum up what your overall objectives are in 2-3 sentences?
- Why are we doing this?

### **Quality of Life Statements**

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- We ask ourselves "How do I want my life to be?"
- The aim is to connect to your core values.
- We have found a lot of people get stuck in labeling specific 'things'; dig deeper. What is really behind each statement?
- These statements should be written in present tense: 'We are', 'We value', 'We want', instead of 'We will', 'We hope'.
- Be sure to address Economic well-being, Human relationships, your personal growth and how you will contribute to others wellbeing.

### **Forms of Production**

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- What you are willing to commit to do to realize your Quality of Life statement?
- Only list what has to be produced, not how it will be produced.
- One Form of Production sometimes satisfies several Quality of Life statements, as you will see in our example. There should be corresponding Forms of Production for each Quality of Life statement.
- Again, we have found a lot of people get stuck in writing very specific 'things' (possibly confusing as 'form of production' makes it sound specific)
- Remember the objective of clarifying our context is to remain truly open, flexible and responsive in our management & decision-making. Keep digging deeper!

### **The Future Resource Base**

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So now you have described this wonderful quality of life, go on to describe how the future of your resource base must be to sustain that quality of life indefinitely. This must include a description of the **land, the people, the community and your behaviour.**

## The Future Landscape

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Describe how the land supporting your Form of Production must look/ act in the future. What will it need to be like in 10, 50 and 200 years from now? You can see the ‘whole’ that you are managing relies on physical land.

Our task is to then make decisions that lead in that direction. This can include a description of other forms of capital, e.g., infrastructure and tools.

## How Must you Behave?

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Our behaviour will is an important aspect under our ‘management’ that we can control. What qualities and characteristics are important in our own behaviors if we wish for our customers to continue to support our enterprise in the future? What services will be required from the community to sustain your forms of production? What characteristics would you like your local and wider community to have far into the future?

## Creating a Shared Holistic Context

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If you are working with others you can go through this process individually to begin with, to clarify your own personal Holistic Context. At this point you should combine the group’s Statement of Purpose. It is important everyone feels like they have contributed to the context and shares the ambition to see this through. Once you all feel good about this, then combine your Quality of Life statements, making sure everyone feels comfortable that all important points are included.

Based on the new Quality of Life Statement, continue with the Forms of Production and Future Resource Base. Make sure every item in your shared Quality of Life Statement is addressed in your Forms of Production and Future Resource Base. If your group has a Statement of Purpose, be sure to include what must be produced to achieve that purpose in your Forms of Production.

You are then ready to use your Holistic Context to test decisions. It is only through use in the real world that your Holistic Context will have meaning and potency. You use the Testing Questions (listed later in the chapter) and record results. It is important to note that the Holistic Context is not a static set of statements. We review ours every year and also amend details

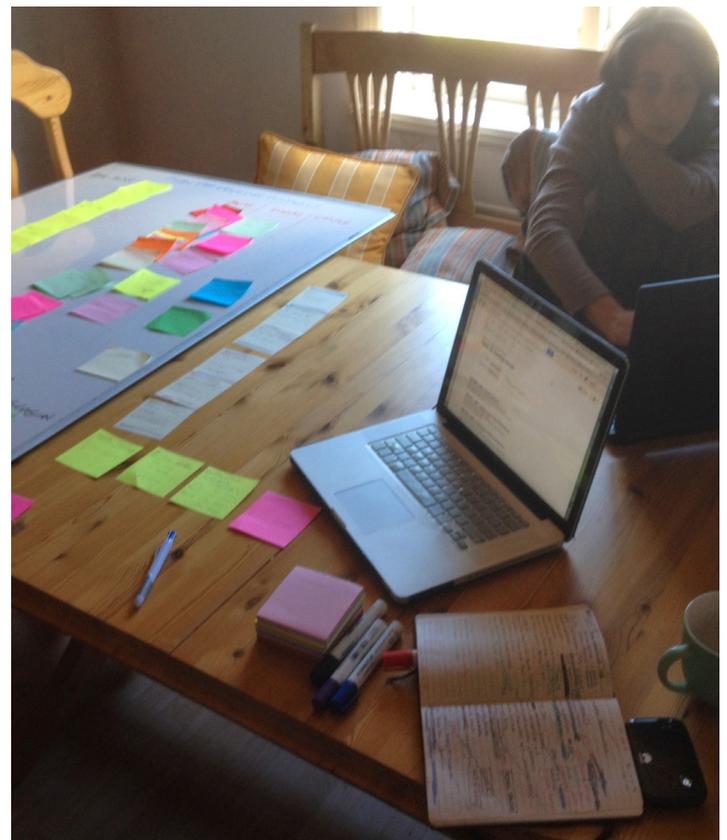
whenever we feel it is necessary. In a group context, this is especially important if people join or leave the group.

## What Are your Core Values?

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To ‘warm up’ before writing your Quality of Life statement, try listing 2 or 3 answers to each of the following questions:

- What are the things that I appreciate most about my life today?
- You could you also identify things I do not want to see changed?
- What are some things that I would like to change in my life?
- What things do your society/ community provide that enable you to live the life that you choose?
- How do you contribute to the wellbeing of your community and society?



Beware of perfectionism, it does not have to be refined initially. It just has to mean something to YOU. Get it out and refine it over time

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## Ridgedale Permaculture Holistic Context

*"...farming, innovating and educating for the benefit of all..."*

### People/Decision-Makers

Richard Perkins & Yohanna Amselem are owners and the primary decision-makers at Ridgedale Permaculture. Our core team (who come committed for 6 months) have decision making power within their roles/responsibilities. Interns have creative decision making in aspects of their experience and are included in decision-making where appropriate within the holistic context.

### Statement of Purpose

Ridgedale Permaculture's foremost responsibility is regenerating landscapes, ecosystem processes and soils through resilient, replicable, scalable and profitable symbiotic farm enterprises. Our secondary function is to educate, facilitate, inform and empower people into action through regenerative design, enterprise and holistic decision-making that fosters and stimulates local community, economy and resilience.

### Quality of life Statements

- We are committed to the benefit of all through our work and lifestyle, positively contributing to the local and global communities.
- We have a lot of fun in our process of life-long learning, we are open and create space for innovation.
- We value minimal waste of all forms of capital.
- We value profitable forms of local production and decision-making that allows for sustainable, stimulating and meaningful income.
- We are financially independent, stable and debt-free whilst building tangible assets for future generations in a robust and resilient manner.
- We want access to clean water and food and maintain our health through beneficial work and eating the highest standard of seasonal and nutritionally-dense produce.
- We relate respectfully to ourselves, participants and the wider community and global networks to support effective collaboration and self empowerment.
- We have time and space to acknowledge and care for loved ones and ourselves.
- We share our knowledge and experience of beneficial solutions and support other's to participate in the regenerative economy.
- We value transparency, professionalism and integrity whilst striving for excellence.

### Forms of production

- Build topsoil via intelligently integrated approaches (biological (plant & animal), mineral & mechanical).

- Innovation in farming, marketing & education.
- Maximize photosynthetic energy captured on site.
- Restore water, carbon and nutrient cycling by mimicking nature's processes.
- Create habitats that fully support organisms physiological needs.
- Demonstrate socially just and sustainable profit with open farm gate policy.
- Support world-class education in all aspects of regenerative systems design and holistic decision making.
- Develop local food resilience and facilitate access to better than organic food by connecting people to local farmers.
- Creative use of resources/ local waste streams to minimise fiscal, human and ecosystem capital.
- Utilise regenerative technologies to minimise oil dependence.
- Create and demonstrate robust decentralised energy production.
- Interception of local waste resources.
- Document and publish articles & data regarding all elements of our operation.
- Clear, open and honest communication with visitors, participants, public and wider networks (locally and digitally).
- Continually reassess our holistic objectives and management process with decision makers as appropriate.
- Building community through (respectful and clear) communication, education and participation.
- Excellent direct customer relationships & services.

### Future resource base

#### Behavior & Conduct

- Commitment to Holistic Goal
- Low input (fiscal, oil, energy, labour) based production
- Well maintained tools and spaces
- Satisfied and returning customers
- Offering tangible value to customers
- Supportive neighbors
- Competent staff/core team
- Healthy working relationships
- Documented design, process, accounts
- Sharing experience over time
- Clear contracts when collaborating
- Sensitivity to cultural norms
- Supporting and valuing local people/enterprises
- Open, honest & joyful communication

- Effective web-based communications
- Open days and active participation in local community events
- 50 km input/output zone
- Stable and expanding network of customers, former training participants and global followers/supporters
- Demonstrating replicable, scalable and tangible solutions
- Clear, recognisable brand

### Future Landscape

- Topsoil creation with soil carbon levels building.
- Pasture developing in rooting mass, diversity, beneficial microorganism populations and plant available nutrients.
- Water under control and evenly distributed across landscape.
- Increased photosynthetic capture/biomass
- Closed nutrient/water/carbon/energy cycling
- Riparian zones intact
- Increasing diversity of wildlife species and health of natural 'feedback' loops for disease free production
- Developing genetics (animal and plant breeding)
- Healthy and maintained perennial systems
- Closed nutrient cycles
- Farm's food needs met on site
- On site water resilience and independence
- Off-grid energy independence
- Poly-income streams for resilience/ diversity

### Testing Decisions

The Holistic Management testing questions help you systematically consider the social, financial, and environmental aspects of decisions you make and determine whether a proposed action takes you toward or away from your Holistic Context. Aim to run through the Testing Questions rapidly, taking a matter of seconds for each answer, then tally up the total. It can become quickly obvious which course of action is favourable. Sometimes you will need to go ahead with an action that fails most of the tests. In this case you should plan ahead for the response you will take, and note when you will do that. Overall the Testing Questions help us to consider the short-and long-term, the needs of others, the health of the community and the

As the owner's & primary decision makers at Ridgedale, Yohanna & Richard believe that financially sustainable and socially beneficial livelihoods are founded on regenerating the world's biospheres. We believe these three aspects that make up our triple bottom line are totally inseparable and so our decision-making consistently reflects this.

We use the testing questions on the following pages to ensure decisions where big decisions or different enterprises are being considered to ensure we are consistently aligned with our Holistic Context. 12 of the key outcomes are summarised below;

1. Build topsoil via intelligently integrated planting/ Keyline design and animal disturbances.
2. Maximise photosynthetic energy captured on site.
3. Restore water, carbon and nutrient cycling by mimicking nature's processes.
4. Create habitats that fully support organisms' physiological needs.
5. Increase diversity of wildlife species and natural feedback loops.
6. Demonstrate socially just and sustainable profit with open farm gate policy.
7. Support world-class education in all aspects of regenerative systems design and holistic decision making.
8. Develop local food resilience & facilitate access to better than organic food by connecting people to local farmers.
9. Prevent wasting of fiscal, human and ecosystem capital.
10. Utilise regenerative technologies to minimise oil dependence.
11. Create and demonstrate robust decentralised energy production.
12. Continually reassess our holistic objectives and management process with decision makers.

Like designing property, this approach to making decisions becomes second nature after a while. It is only really interesting when you apply it, and probably does not make an interesting read. What is important is that it is crystal clear for YOU. I would encourage you to stick with it even if it feels clunky or unfamiliar at first. The most important aspect is to get the Context out there, together with whoever is involved in Decision-Making. Get started on it.

landscape that supports it, as well as the welfare of future generations and ourselves. We are not usually conditioned into this long-term approach to making decisions but with practice you become familiar with the testing questions and the process can be very rapid. Some of our biggest decisions at the farm have been made quickly and effortlessly over a cup of tea in our underpants.

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## The Testing Questions

(Use these questions in the following order)

### 1. Cause & Effect

- Does this action address the root cause of the problem?
- What is really going on here?
- If there is no problem, then is there an opportunity for growth?

### 2. Weak Link (social, biological or financial)

- Will taking this action lead us towards or away from the capital base described in our Future Resource Base?

#### Social

- Will this action address or cause any opposition with any of the people whose support we rely upon?
- Could we upset our business by taking this action?

#### Biological

- Have I identified the weakest point in the organism's life cycle?
- Does this action strengthen the weakest link in the effected organism(s)?

#### Financial

- Does this action strengthen the weakest link in the chain of production? (Resource conversion, Product conversion, Money conversion)

### 3. Marginal Reaction

Use when choosing between enterprises;

- Which action provides the greatest return (in terms of your Holistic Context) for the time and money spent?
- Which action provides the 'biggest bang for your buck'?
- List any info/ research needed to answer this fully and who should do that work?

### 4. Gross Profit Analysis

Comparing two or more enterprises;

- Which enterprises contribute the most to covering the overheads of the business?
- Is the enterprise yielding a high net-profit under poor, average or good conditions?

- Is the profit the money that is available to pay overheads, including your own wages?

### 5. Energy/Money Source & Use

- Is the energy or money to be used in this action derived from the most appropriate source in terms of my/our Holistic Context?
- Is the energy derived from a finite or infinite source and will its use be damaging?
- Will the way in which the energy/money is used lead towards, or away from, your Holistic Context?
- Is the energy/money going to be used to create infrastructure that is moving you towards your Holistic Context?
- Are we creating unnecessary or avoidable dependence here?

### 6. Sustainability

- If we take this action, will it lead us towards or away from the Future Resource Base described in our Holistic Context?

### 7. Society & Culture

Coming back to feelings last, they can swing a decision either way:

- Considering all of the questions and your Holistic Context, how do you feel about this action now?
- Even if something passes all tests above you may feel a hunch not to go through with it. The same is true in reverse. Either way, having considered the whole you can plan to negate the negative consequences of the decision.

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## Monitoring Your Decisions

Holistic Management is built with an assumption that we are wrong. For all decisions, list some early warning indicators that you can monitor. This applies equally to social, biological and financial elements. A planned monthly incomes and expenses and up-to-date accounting is a good example of something planned that you can monitor and adjust to keep you heading in the direction of the 'whole' plan. The same applies to grazing of livestock or very specific elements of enterprises. You may need to come up with you own set of criteria for monitoring your decisions, such as in dealing with a specific pest. Monitoring will allow you to see if you are heading the direction you would like to go or not. You may need to adjust or totally replan, depending on the results.

**DECISION MADE BY** Names: Richard & Yohanna

Date: Nov 2014

**PROPOSED ACTION & OBJECTIVE:** In scaling up the Mkt. Garden to commercial enterprise, finding efficient approach to manage this

**Is there a specific PROBLEM?** Tenacious perennial weeds; couch grass. Low organic matter

**Are there ALTERNATIVE ACTIONS being compared?**  
 1. Invest 100,000 Kr in BCS 2 wheel tractor & implements to allow for weed control and OM incorporation via shallow surface tilling. 2. Invest 40,000 Kr in imported compost and make total no-dig system, blanket out weeds and maintain by hand

Mark Pass or Fail for each test for each alternative if possible. List any additional issues or points raised.	P A S S	F A I L	P A S S	F A I L	Notes, Further Information Needed
<b>CAUSE &amp; EFFECT TEST:</b> Does this action appear to address the root cause of the problem? Have we discovered the root cause of the problem yet?		F			OM for intensive veg. requires inputs. Tillage spreads weeds
<b>WEAK LINK TEST - SOCIAL:</b> What are the possible reactions and effects of this action? How can I/we enhance any positive effects or address any negative effects?		-		-	OM enhanced by no-dig more than tillage
<b>WEAK LINK TEST - BIOLOGICAL:</b> Does this action address the weakest point in the life cycle of this organism, whether enhancing or diminishing its impacts?		F		P	Tillage controls weeds but damages soil structure, awakens weed
<b>WEAK LINK TEST - FINANCIAL:</b> Does this action address the weakest link in the chain of production (resource conversion, product conversion, marketing)?		F		P	No Dig feeds soil whilst reducing labour
<b>MARGINAL REACTION TEST:</b> Comparing two or more actions, which provides the greatest return, in terms of my/our holistic goal, for the time, money and effort spent?		F		P	Compost= lower investment for greater return
<b>GROSS PROFIT ANALYSIS TEST:</b> Comparing two or more enterprises, which contribute the most to covering the overhead of the business?		-		P	BCS would be efficient (low labour)but continued use necessary
<b>ENERGY / MONEY SOURCE &amp; USE TEST:</b> Is the energy or money to be used sourced in a manner consistent with my/our holistic goal? Will the way the energy or money is used lead toward my/our holistic goal?					Note to self. It seems possible to close nutrient cycles and create future compost needs on site. With this in mind the ongoing cost would be largely human hrs inputted
<b>SOURCE</b>			F	P	
<b>USE</b>					
<b>SUSTAINABILITY TEST:</b> Will this action lead toward or away from the future resource base described in my/our holistic goal?		F		P	Leads to requiring oil and repairs/maintenance over time
<b>JUSTIFICATION TEST:</b> I/we can honestly say these tests have been used objectively, and not merely to justify a specific desired outcome?					BCS would work well, No dig has more benefits across more aspects of our context and at lower cost
<b>SOCIETY AND CULTURE TEST:</b> Gut Check – Considering all the testing outcomes and my/our holistic goal, what is the feeling about the proposed action now?		F		P	No Dig feels more in line with where we'd like to be in 5 yrs
<b>MONITORING:</b> What social, financial, and ecological indicators can be tracked to discover as quickly as possible whether this action is leading towards the desired progress? 1. Record total human hrs for weeding, installing & tot. for Mkt garden. 2. Monitor compost application rates over 4 years					