

Markum Farms – Holistic Management Decision Case

1. Mark and Uma Markum have a 300 acre beef cow-calf diversified farm in central New York. Tim is their farmhand who has been with the farm for the past 12 years and is seen as almost one of the family. Mark and Uma's two children, Butch and Tanya worked on the farm up until they left for college.
2. Markum Farms has 15 part-time seasonal employees and a host of professionals who help the farm. These professionals include a County Cooperative Extension Educator, Cooperative Extension Beef Specialist, Soil & Water Conservation District Technician, NRCS District Conservationist (planner), various professional trade organizations, pest scouts, seed & fertilizer dealers, neighboring farmers, and a local bank farm loan officer.
3. Markum Farms currently annually produces 75 beefers, 25 hogs, 10 acres of sweet corn, 5 acres of strawberries, and 15 acres of Christmas trees along with the odd 25 cords of firewood. In addition to the pasture, cropland, forest land; they have an irrigation pond, roadside farm stand, 4 sheds and buildings that house the following: field equipment, 2 older tractors, 4 wheeler, portable fencing, mobile watering troughs & feeders, storage space, etc.
4. Mark and Uma have farmed their 300 acres for the past 27 years and it has been profitable but far from lucrative. They have talked a lot recently about scaling back their time commitment to the farm and of taking longer vacations and spending more time at their lake cottage on Lake Ontario. They would like to see the farm continue or expand its operations and hope to interest their children in taking over some of the operations and decision making.
5. Tanya is not sure if she wants to come back to the farm and work for her parents but is interested in the farm staying viable and perhaps some day she would consider becoming more involved in the future. Butch is sure he wants to make his living farming but would like to be the boss and not work for his parents. He has learned many new practices in school and is keen on trying out some organic practices. Tim also intends to stay on the farm, yet is unsure what role he will play and what the succession plan is and if it includes him as Mark and Uma consider their futures.
6. Mark and Uma desire to farm with their kids but are unsure about some of the changes Butch is advocating and worried that Tanya will drift away from the farm and not return. They have great faith in Tim and feel he is crucial to expanding the farm and increasing overall farm income. In addition, they do not believe that currently the farm can financially support Butch and his high maintenance fiancée Bridgette along with Tim and Tanya considering the need for health insurance & retirement plans.

7. What can Mark and Uma do in terms of stepping back from the operation while bringing Butch into more of a managing position and keeping Tanya interested in the farm?

- Develop two potential courses of action and test these.

8. What can Mark and Uma do to keep Tim involved?

- Develop two potential courses of action and test these.

Activities:

Step 1 – Develop a *Whole Under Management* for Markum Farms.

Step 2 – Consider the *Temporary Holistic Goal* for Markum Farms.

Step 3 – *Test* potential courses of action.

Step 4 – **Develop** a few specific *criteria* for monitoring the chosen course of action.

Prepared by Phil Metzger, 2008.