

Creating FarmSalus: An assessment tool for farmer wellbeing

A RESEARCH REPORT FOR THE
HILL COUNTRY FUTURES PROGRAMME

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Summary

Beef + Lamb New Zealand's (B+LNZ) five-year multidisciplinary research programme, the Hill Country Futures (HCF) Programme, comes to an end at the end of 2022. As such, results of the various research themes are now being presented. In this Report, we describe a new Assessment Tool for measuring and monitoring a component of farm resilience by measuring farm and farmer health and wellbeing. By the end of the HCF Programme, the tool will have been tested and refined with end-users and further relationships built and developed within its catchment groups following advertisement and promotion of the tool within the farming community.

Background

Sheep and beef farming in New Zealand's hill country landscapes is subject to multiple pressures, including increasing competition by forestry, more stringent environmental regulation, changing consumer expectations, and new market requirements. In response to these pressures, the HCF Programme, a five-year multidisciplinary research programme led by B+LNZ, has been investigating how to ensure the long-term profitability, sustainability, and wellbeing of New Zealand's hill country farmers, their farm systems, their environment and rural communities. This Report presents the results of one of the research strands within the larger HCF Programme.

The HCF Programme:

“Focused on future proofing the profitability, sustainability and wellbeing of New Zealand's hill country farmers, their farm systems, the environment and rural communities.”

How do we tell if a farm is “future proof”?

Dealing with multiple pressures and constant change has always been a part of farming. Whether it is dealing with variable weather conditions or a sudden change in stock prices, farming businesses are well used to dealing with variability. However, in recent years, the direct and indirect impact of climate change, shifting societal expectations, and a suite of new regulations has increased the rate of change and the amount of uncertainty in the hill country farming sector.

Given the myriad of pressures that farms and farmers are facing, there is broad agreement that increasing resilience to expected and unexpected events is key to future-proofing farms and farmers. This then leads to the questions of how to measure resilience in hill country farming and how to monitor if progress is being made towards the goal of “future proofing”? Or, put another way: what makes one farm or farmer more resilient than the next and would this be the same in all situations?

The Social Research Team of the HCF Programme has worked with farmers and other stakeholders to find answers. A summary of this work, which culminated in the development of an Assessment Tool for measuring and monitoring a component of farm resilience, is presented in this Report. This tool fills a gap in the resources available to rural professionals and facilitators who are working with farmer extension and/or farm planning, and can be used as a decision-prioritising tool for hill country farmers and other stakeholders in the industry.





Exploring what “future proofing” means to farmers and others working in the hill country farming sector

Between July 2019 and March 2020, the HCF Social Research Team talked to almost 300 people in 170 face-to-face interviews to find out what is happening in hill country farming and what the best future could be¹. Those interviewed were primarily sheep and beef farmers but also included rural professionals, academics, and industry leaders. They ranged from 18 to 79 (average 50) years old; 31% were women; and 7% self-identified as Māori. The farmer interviews were spread widely throughout New Zealand to maximise representativeness of the testimony.

In addition to this in-depth interview series, the team consulted key industry stakeholders, during which the themes of future proofing, farm sustainability, and how to maintain long-term profitability in the face of changing societal expectations were discussed.

Our conclusion from this broad stakeholder consultation was that future-proofed farming is often thought of as being founded on the success of three interconnected strands supported by wider support networks. The three strands are healthy farmers, healthy farm businesses, and healthy farms.

Healthy Farmer

The farm manager(s) and farm staff feel content, proud, and well connected. Farm manager(s) have a clear vision for the farm.

Healthy Farm Business

Profitable and viable for the long term. Adhering to best practice for businesses with regards to staff employment, health and safety, and regulatory compliance.

Healthy Farm

Healthy animals, healthy soils, environmental best-practices, erosion control, and a climate-neutral system.

All of these are supported by:

Community and Support Networks

These include whānau, local community, online farming communities, rural professionals, industry professionals, and the wider agricultural sector.

We acknowledge that this framing is a simplification of a farm system. It is important to stress again that neither the three strands nor the farm itself exist in isolation, rather the strands are inter-dependent and the entire farm system is connected to a wider community. An example of this interdependence is observing that a profitable and well-run farm business will support the health and wellbeing of the farmer(s) and their whānau, while also providing the means for investment into stock, the environment, and capital investments. Similarly, it is well recognised that a farm operating to high environmental and animal-welfare standards will have more market options available, which feeds back into a successful business model. In the ideal “future-proofed” farm, all three strands will be high functioning and well supported by the wider community and support networks, although it is worth noting that improvements in any of the three strands has the potential to create positive feedback loops leading to improvements of the others.

¹More details of the interviews and key findings can be found on the HCF website (www.hillcountryfutures.co.nz).

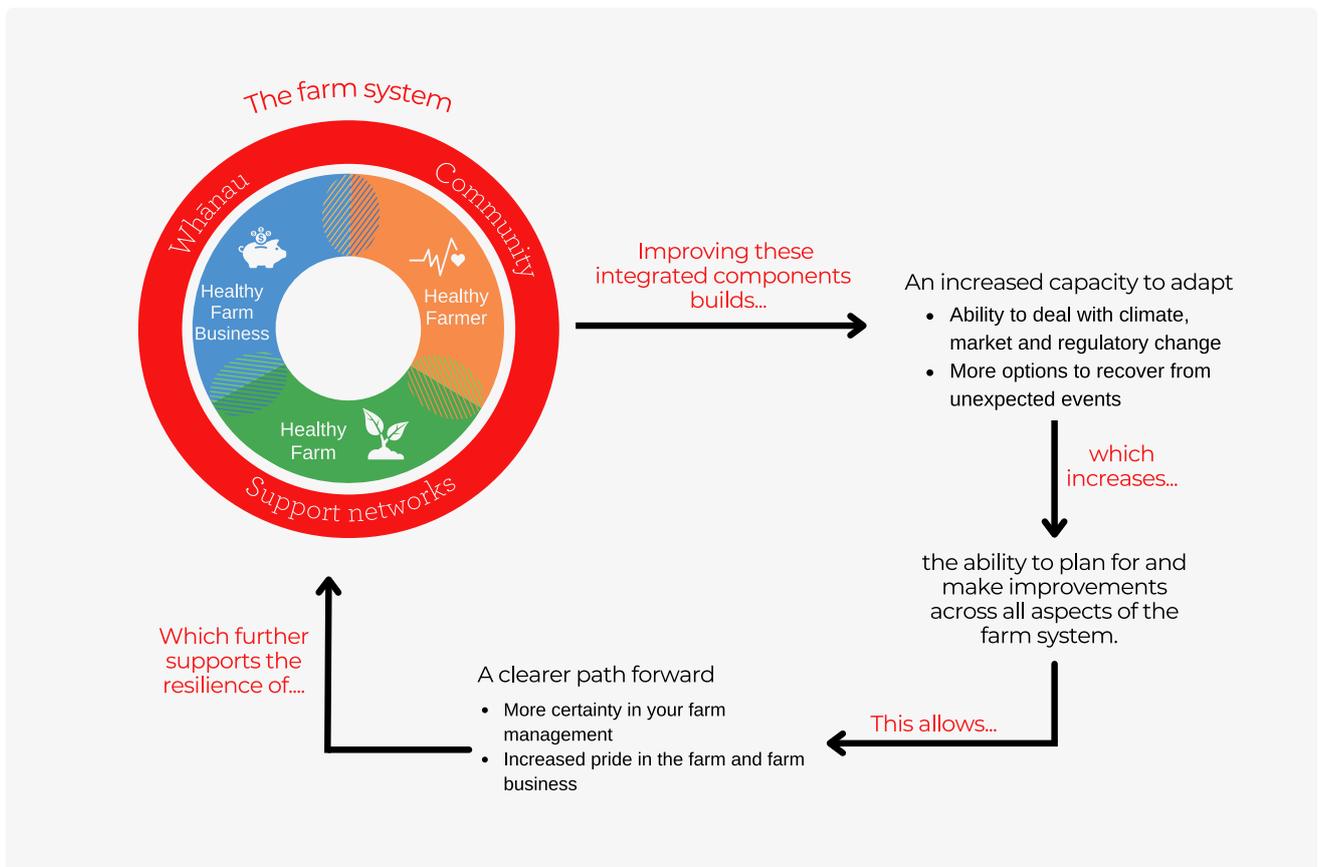


Figure 1: HCF Framework for Future proofed farm systems. Our conclusions from a thorough stakeholder consultation were that “future-proofed farming” is often thought of as being founded on the success of three interconnected strands, supported by the wider community and other support networks. The three strands are healthy farmers, healthy farm business, and healthy farm. Community and support networks include rural professionals, industry bodies, meat processing, and marketing companies. Investing in and improving all of these components leads to a positive feedback loop that builds resilience or “future proofing” of the farm system.

Designing an Assessment Tool to measure the resilience of hill country farms

A collaborative approach recognising the needs of the end-users

The research approach of the HCF Social Science Team has been based on the principles of collaborative research with the aim of producing a tool that matches the needs of the end-users and has life beyond the time span of the research programme. Consequently, when designing the Assessment Tool, it was imperative for us to take a stakeholder-led approach.

Creating a first prototype of the Assessment Tool

The first prototype of the tool was produced using the data and observations from our large resource of stakeholder interview transcripts.

We undertook an in-depth qualitative analysis of the 170 interviews using the 54 objectives described in the NZ Sustainability Dashboard²; a structured framework designed to guide industry reporting on sustainability. In addition, two researchers undertook a separate analysis of a subset of interviews from the representative farmers group using a grounded theory approach³. From the combined results of the structured analysis and the grounded theory approach, we identified the key themes that stakeholders viewed as imperative to future-proofing hill country farms and farming. From there, we assigned metrics to each of those themes to form a structured Assessment Tool. Consequently, in its earliest prototype stages, the HCF Assessment Tool was a tabulated framework: a table of key themes and their associated metrics (Figure 2).

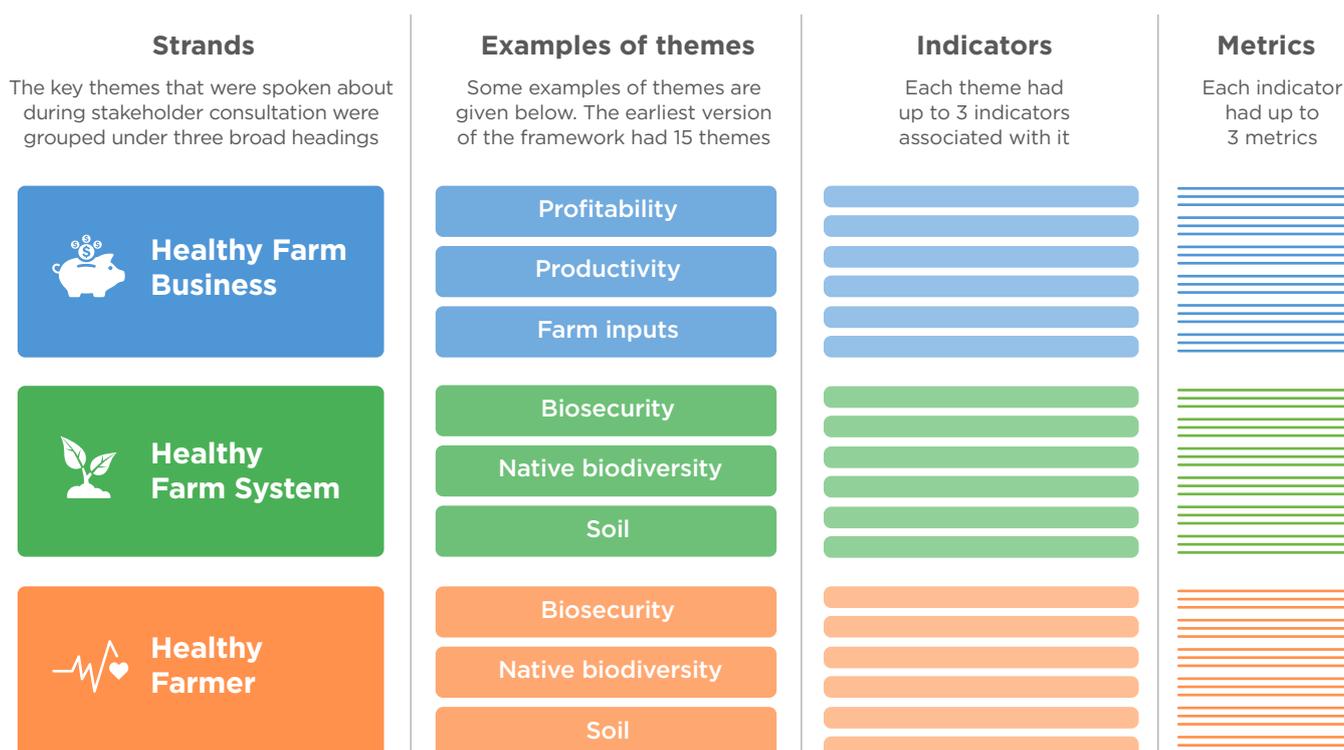


Figure 2: A representation of the early prototypes of the HCF Framework. An Assessment Tool to measure and monitor the resilience or the extent of “future-proofing” on hill country farms. Feedback from end-users was that this tabulated approach had merit but that there were several drawbacks, including that it was too detailed and required too much farmer time to gather the data required.

²NZ Sustainability Dashboard: in partnership with the country’s agricultural industry sectors, the New Zealand Sustainability Dashboard project built online user-friendly tools for sustainability assessment and reporting. It can be found at: <https://sustainablewellbeing.nz/nzsd>.

³Grounded theory is an established social research method in which the researcher reviews the interview data from a fresh starting point and does not have a predetermined set of themes or issues to search for. Rather, they are closely observing what has been said by the interviewees and recording the themes that emerge from the data. More details can be found in: Tolich, M. and Davidson, C. 2011, “Getting Started An introduction to Research Methods” Person, Melbourne.

Iterative cycles of stakeholder-led design

In accordance with our stakeholder-led approach, we consulted widely to see if the prototype framework was a tool that the intended end-users (farmers and rural facilitators) would want to adopt. We ran a series of presentations and design meetings with farmers, rural-extension facilitators, and rural professionals experienced in the evaluation of farming systems. External groups and individuals included in the design process were the NZ Farm Forestry organisation, the NZ Rural Support Trust, the B+LNZ Economics and Insights Advisory Board, Ministry for Primary Industries (MPI) extension specialists, chairs of two established catchment groups, Crown Research Institute (CRI) researchers working on hill country farming projects, an agricultural consultancy, and farmers from a range of different backgrounds and stages in their careers. In addition, the B+LNZ Economics and Insights Team and Economic Services Team Managers were consulted.

The honest feedback was invaluable. We were told repeatedly that while the tabulated framework approach had merit, the resulting number of metrics was too large for wide-scale adoption by farmers. Another drawback was that the data for several of the numerical metrics would be difficult and expensive for farmers to attain, and therefore independent assessors would be needed to assist with data collection on farm. We also considered the subsequent and substantial challenges associated with data retention, security, and analysis, and if the benefits of gathering such a complex data set could feasibly be realised. Additionally, several people noted that there was a lot of repetition between this prototype Assessment Tool and others that are currently in use, such as the New Zealand Farm Assurance Programme, the Red Meat Profit Partnership Group Key Performance Indicators, and the B+LNZ Economic Services Survey⁴. Overall, the necessity for this type of detailed Assessment Tool came under question, especially with reference to the economic and environmental indicators. The feedback was taken on board and the Assessment Tool was redesigned over several iterations.

Summary of the feedback received:

- Avoid anything too detailed, especially for economic and environmental metrics – this is covered by other farm assessment tools
- Do not create a tool that requires a lot of time or financial investment from the farmer to gather metrics. Few farmers would be able to give this, unless there is an explicit reason and a direct positive feedback loop – such as a link to a market certification or access to a premium price
- Do have a focus on social issues and/or farmer wellbeing – because this is a gap from other evaluation tools that are used in hill country farming
- Do create a tool that can be used by rural professionals and/or extension facilitators to promote reflection on the human factor that impacts on the resilience of a farm and/or farmer(s)
- Keep the tool simple and high level so that farmers have a chance to reflect on their whole farm system rather than diving into specific management details
- Create something that could be incorporated into farm-planning workshops somewhere down the track
- A simple on-paper tool would be best – something that can be used in a short workshop
- A lot of facilitators working with farmer groups would welcome a tool that opens conversations around wellbeing and mental health
- Numerical metrics may not be the best way to go for wellbeing indicators – the level of subjectivity makes numerical data collection challenging; a qualitative approach would be better.

Avoiding overlap with existing tools

A brief gap analysis of the evaluation tools relating to resilience, sustainability, or best-practice in hill country farming revealed a strong tendency towards the use of economic and production metrics, and, in more recent years, metrics that measure environmental performance. Tools reporting on social indicators are less common and when they are in use, they tend to focus on regulatory compliance related matters, such as terms of employment and health and safety. There is little available to measure farmer wellbeing, even though many would agree that good farmer wellbeing is integral to the future proofing and resilience of a farm business. A summary of monitoring and evaluation tools used commonly in hill country farming is presented in Appendix A.

Reworking the HCF Assessment Tool to focus only on the social dimension of future-proofed farming

Pivoting direction in our design process

One of the key themes from our interviews with farmers was a desire to be understood, and for agencies and facilitators to understand farmers' needs and wants, so that support to help advance their business and environmental aspirations can be developed. With this in mind, we felt that it was imperative to stay true to the challenge of collaborative design for the HCF Assessment Tool. Consequently, several months into the design process, we completely reworked our design intentions for the HCF Assessment Tool in response to consistent themes in the feedback that we were receiving.

We moved away from building an evaluation tool for all aspects of farm resilience and future-proofing to a tool that focused only on social metrics and, more specifically, would enable farmers and rural professionals to monitor issues relating to farmer health and wellbeing. This includes farmer wellbeing as well as the aspects of farm business and farm environment that may influence farmer health and wellbeing. The pivot to this new design concept has received overwhelming support from stakeholders, with feedback being given that this concept fills a gap, or missing piece, from existing monitoring and evaluation tools.

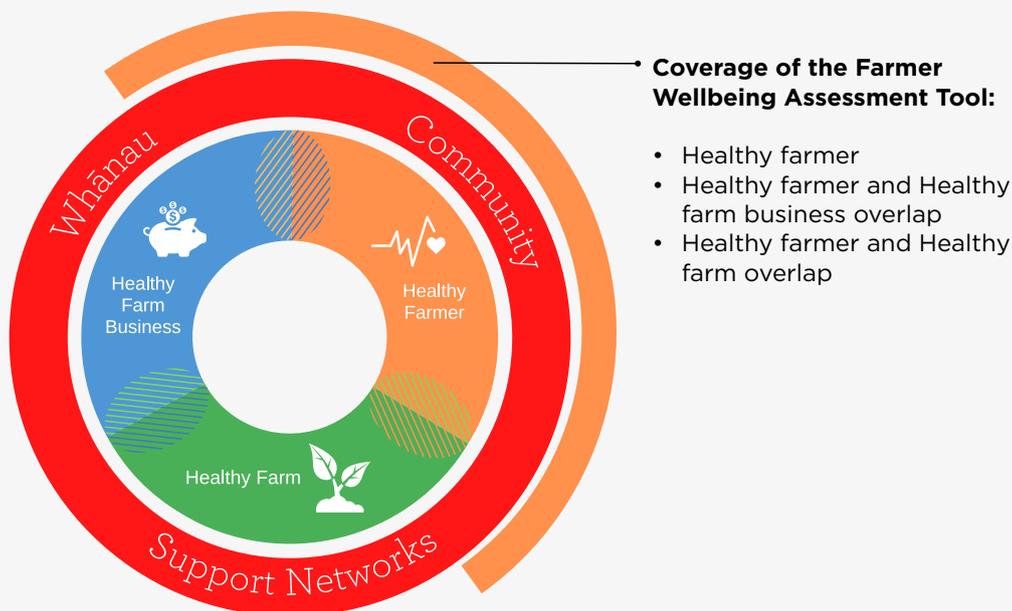


Figure 3: Revised scope for the HCF Assessment Tool. In response to the needs articulated by end-users, the focus of the HCF Assessment Tool are measures relating to “healthy farmers”. This includes farmer health and wellbeing, as well as the aspects of farm business and farm environment that may influence farmer health and wellbeing.



Justification for building a tool that only evaluates social measures

Many in the hill country farming sector identify an important factor for farm success as an ability to cope with and recover from variability and shocks. Be those shocks in the market, variable weather, changes to regulations, disease outbreaks, pest incursions, pandemics....the list goes on. To measure farm success in these terms requires an integrated systems-based approach that recognises the many moving parts of a farming system and how they relate to one another.

In its simplest form, this should consider economic, environmental, and social and governance dimensions⁴. In this context, we define the social dimension of farming to include both human capital (personal wellbeing and health of people) and social capital (the relationships that underpin the systems that farming rely on).

Social themes were prevalent in the stakeholder interviews⁵ and many of the rural professionals that we consulted expressed concern for the general wellbeing of farmers in the industry. We have seen attention towards mental-health issues increase enormously in recent years and this has been matched by increasing acknowledgement of the importance of good mental health for farmers. Yet there is no evaluation tool designed specifically to measure and monitor farmer wellbeing.

Although there are multiple well established measures of farm performance, historically, these have had an emphasis on economics and production metrics. In the last decade, farm-evaluation tools have expanded, so that most now also include measures of animal welfare and environmental sustainability and/or greenhouse gas emissions. However, tools to evaluate social dimensions of the farm system are nowhere near as well established as their economic and environmental counterparts. As the industry shifts towards pursuing resilience, there is a pressing need for evaluation tools that address this gap.

⁴Another key dimension that is often considered in resilience frameworks is Governance. We acknowledge this dimension but have excluded it from our current Assessment Tool because of scope and resourcing. It is an element that should be included at a later date.

⁵More details of these social themes can be found in the Farmer Perspectives report series on the HCF website (www.hillcountryfutures.co.nz).





FarmSalus: The HCF Assessment Tool

FarmSalus is the name given to the Farmer Wellbeing Assessment Tool. The name was inspired by the Roman goddess of safety and wellbeing.

The aims of FarmSalus:

- To provide a tool for farmers, catchment groups, and rural professionals to measure and monitor farm success through the lens of farmer health and wellbeing
- To provide a resource for rural professionals that can open discussions on farmer health and wellbeing and how this impacts on wider farm success.

The intended end-users of FarmSalus:

- Farmers (facilitated to use the framework)
- Catchment groups and action-network groups
- Rural-extension facilitators
- Rural professionals working directly with farmer clients.

FarmSalus is intended to be facilitator-led

Through our interview work and design meetings, we have been alerted to the importance of facilitated discussion with and among farmers. Our interviews identified that farmers really value having someone

to talk to rather than filling out a survey on their own. The farmers interviewed were grateful for the opportunity to be asked questions on topics that they hadn't thought about and to have the opportunity to be heard and feel listened to. Similarly, rural professionals that work with farmers have expressed the importance of building trust before introducing new ideas, and the power of trust and learning that happens within facilitated groups.

We recognize the power of a trusted facilitator and, for this reason, we think that FarmSalus will be most successful if it is adopted and used by rural-extension facilitators and/or training facilitators in agri-development courses and workshops.

FarmSalus is designed to be a high-level assessment

Given that FarmSalus is designed for use by facilitators, we have created a survey with questions that are at a high level. We have designed a tool to start meaningful discussion, rather than be a detailed tick-box list. The intention is that the facilitator will take farmers on a journey, to think about their farm system in its entirety, and their role in building resilience on their farm.

FarmSalus is presented in full in Appendix B.



Future work

Testing and refinement of FarmSalus with end-users

The HCF Programme ends at the end of 2022. From now until the end of the programme, the Social Research Team will be using FarmSalus in field days and training workshops. The purpose of this is three-fold:

- To promote FarmSalus within farmer groups
- To ensure that the tool is fit for purpose by continuing to test it in real-life situations
- To build relationships with organisations that are interested in adopting FarmSalus for the longer term.

Integrated farm planning: an opportunity to use FarmSalus

All farms above 20 hectares are now required to have farm environment management plans (FEMP). This recent regulation has created an opportunity to review farm-planning approaches and, several organisations, rural advisors, and regional councils have worked to provide templates and extension services to assist farmers with completing their FEMP. Owing to the time pressures and enormity of the task, the majority of FEMP tools and extension materials produced to date have been focused on economic sustainability and environmental integrity.

There is widespread recognition of the importance of a fully integrated systems-wide approach to farm planning, which includes social and governance metrics, alongside economic and environmental ones⁶. Further development of FEMP will undoubtedly take place and there is an opportunity to include social and wellbeing indicators in the next iterations of FEMP plan templates and resources. FarmSalus provides a slot-in resource for that purpose or a starting point from which organisations and councils can develop their own wellbeing indicators.

Future Opportunities for FarmSalus

The FarmSalus tool was developed in response to a need for a monitoring and evaluation tool for farm system resilience and future proofing. The research team recognise that scientific monitoring and evaluation tools are not the only method of understanding farm resilience and whole-system health. There are other knowledge systems that extend beyond western science-based approaches which would apply a different lens to farm systems. We recognise Te Ao Māori and mātauranga Māori as a world view and knowledge system that are equal in standing and complementary with western science approaches, and which already have a strong holistic and wellbeing emphasis.

The development of the FarmSalus tool is a step towards systems-thinking approaches based on both human-centred metrics and a recognition of whole-farm resilience. Although Māori voices were part of the stakeholder interviews and iterative design process, it is important to recognise that the overall methodology of developing a monitoring and evaluation tool is one that is grounded in a western-science convention, not mātauranga Māori and this is a limitation of this research.

Here in Aotearoa New Zealand, Te Ao Māori is crucial to conversations about the future of farming and resilience in the industry. With that in mind, it is important that we bring mātauranga Māori to the fore in agricultural research. The research team view the FarmSalus tool as prototype that will evolve over time as it is used and reviewed by end-users. It is important to recognise its limitations and the need for further research founded on Te Ao Māori which explores how to assess farm resilience and whole-system health.

⁶The importance of integrated farm planning is recognized by MPI in the following report: MPI (2021) Good Farm Planning Principles: Towards Integrated Farm Planning. www.mpi.govt.nz/agriculture/farm-management-the-environment-and-land-use/integrated-farm-planning-work-programme/

Existing monitoring and evaluation tools that relate to hill country farm resilience

Background

Seeking resilience in hill country farming has quickly become a pathway to deal with the uncertainty arising from rapid climate, market, and social changes. To understand what needs to be measured to improve how we monitor resilience within hill country farming, we have undertaken a brief review and gap analysis of the monitoring and evaluation tools being used currently in hill country farm systems. In other words, what is measured the most currently? What is outside of the scope of these existing frameworks?

The aim of this appendix is to contextualize the HCF resilience framework/FarmSalus within the suite of already existing monitoring and evaluation tools that can be used to measure farm resilience, sustainability, and/or high industry standards.

This review does not aim to provide an extensive review of all monitoring and evaluation tools in the agricultural sector, rather, it presents the most commonplace, output-focused evaluation tools that are applied to hill country farming in NZ. Therefore, this comparison is by no means extensive and excludes highly input focused frameworks/certifications, such as BioGrow Organics⁷, and also standards that are not available publicly, such as Merino NZ's "ZQ Merino" (ethical wool standard) and "ZQRX Merino" (regenerative wool standard) frameworks⁸.

Other ways of measuring resilience

The authors of this report recognise that monitoring and evaluation tools are not the only method of understanding farm resilience and whole-system health. There are various knowledge systems that extend beyond science-based certifications, standards, and planning that apply a different lens to view the farm system. For example, this appendix does not account for worldviews, such as Te Ao Māori, which already have strong holistic and wellbeing approaches.

Although such knowledge systems are outside the scope of this appendix and accompanying Report, Te Ao Māori is recognised as an important part of the conversation of "what is resilience in hill country farming?". As hill country farming continues to shift

away from its historical primary focus on financial metrics, and also a sole reliance on science-based metrics, approaches to wellbeing and other aspects of the farm system that are included in the Māori worldview will become crucial to the development of a new system of thinking about resilience in the industry.

Commonly used monitoring and evaluation tools for hill country farming

There are no current frameworks applied in New Zealand hill country farming that explicitly measure the resilience of on-farm systems. However, there are several evaluation tools that analyse the farm system for related purposes, such as determining sustainability and producing farm environment plans, for quality assurance.

An overview of some of the most commonplace frameworks and evaluation tools are provided next and are compared in Table 1:

Red Meat Profit Partnership (RMPP) - Top 10 KPIs

RMPP created a core set of KPI measures for red meat farming businesses. These indicators are based on measuring farm performance and are strongly based around financial and performance metrics for livestock.

B+LNZ Economic Services team survey⁹

B+LNZ collect annual data on farm performance from sheep and beef farms country wide. The Economic Service team was set up in 1950 to record the state and financial health of New Zealand's Agricultural industry and provide a benchmark for farmers on the success of their business in relation to those around them. Therefore, the KPIs they use strongly reflect this initial focus on farm performance and are based around financial and livestock performance metrics. Only in recent years have other metrics, such as greenhouse gas emission levels, begun to be incorporated into yearly data collection.

Data in Table 1 are based on indicators measured in the Compendium of NZ Farm Facts 2021 and the Sheep and Beef Farm Survey.

⁷More information can be found at www.biogro.co.nz.

⁸More information about the values that underpin the quality-assurance frameworks developed by the company Merino NZ can be found at www.discoverzq.com/get-zq.

⁹https://beeflambnz.com/sites/default/files/data/files/Compendium%202021_digital.pdf and <https://beeflambnz.com/data-tools/economic-reports>



B+LNZ - Farm Plan: Environment Module¹⁰

B+LNZ farm planning uses a modular approach to help farmers plan for the future of their land and business. The Environment Module primarily covers soils, freshwater, biodiversity, waste and chemical management, irrigation management, climate change, and forage cropping (including winter grazing). The Farm Plan approach used is a highly practical approach.

MPI - Good Farm Planning Principles: towards integrated farm planning¹¹

The Good Farm Planning Principles encourage an integrated approach to farm planning. The principles cover people, biosecurity, animal welfare, greenhouse gasses, and freshwater. The integrated farm-planning approach is designed to build on existing farm-planning initiatives, such as the farm plans and NZFAP programmes that exist for hill country farming. The 'People' principle primarily involves employment relations, health and safety and a small amount of wellbeing considerations, such as reinforcing the importance of open communications strategies and directing staff towards wellbeing support resources if required.

New Zealand Farm Assurance Programme (NZFAP)¹²

NZFAP is the national standard for farm quality assurance. It focuses on origin, traceability, food safety, and animal welfare with the aim of providing quality assurance for national food safety and international exports. The programme is voluntary, but the majority of major red meat and wool exporters use this standard.

NZFAP Plus¹³

NZFAP Plus extends on the NZFAP requirements to include a higher voluntary focus on sustainability. The three pillars include people, farm and natural resources, and biosecurity. The 'People' pillar of the NZFAP Plus focuses strongly on business-related people metrics, such as employment relations, health and safety, training, and development. Wellbeing is also included in this and involves recording community involvement and having a list of wellbeing resources available.

Our land and water: Multi-Criteria Decision-Making (MCDM) framework¹⁴

The MCDM framework exists to assist complex decision-making on land-use change. The framework is based around six domains that are necessary to consider when making land-use change decisions – financial, market factors, knowledge base, regulations, social wellbeing, and environment – each with a series of criteria. The social wellbeing criteria include employment factors, value distribution, quality of life, cultural values, and noise/visual impact. This framework, therefore, is one of the most comprehensive social elements of those mentioned in this Report, but its use remains within the scope of decision-making for land-use change. It is also the framework that considers resilience most strongly because it is targeted towards creating a risk-benefit analysis of changing land uses on a farm. It therefore considers criteria, such as variability in profit, and the strength and variability of supply chains, and applies more emphasis to knowledge uptake to enable diversification.

¹⁰<https://beeflambnz.com/farmplan>

¹¹<https://www.mpi.govt.nz/dmsdocument/45382-Good-Farm-Planning-Principles-Towards-Integrated-Farm-Planning>

¹²www.nzfap.com/site_files/23537/upload_files/NZFAPStandardSeptember2021v4F.pdf?dl=1

¹³[www.nzfap.com/site_files/23537/upload_files/NZFAPPlusStandardOctober2021F\(1\).pdf?dl=1](https://www.nzfap.com/site_files/23537/upload_files/NZFAPPlusStandardOctober2021F(1).pdf?dl=1)

¹⁴https://ourlandandwater.nz/wp-content/uploads/2022/02/OLWRResearchFindingsBrief_MCDM_NGS_Supporting-complex-decisions-on-land-use-change.pdf

Table 1: Common existing monitoring and evaluation tools used to understand the performance of the hill country farm system.

| Monitoring and evaluation tool | Business | | | | | Environmental | | | | | | | | Social | | | | | | |
|---|-------------------------|-------------|---------------|-------------|------------------------------------|---------------|------|------------|--------------|------------------|---------------------------|------------------|-----------------------------------|--|-------------------|----------------------|-------------------------------|-------------------------|--------------------------------|-------------------------------|
| | Origin and traceability | Farm inputs | Profitability | Food safety | Productivity (and associated KPIs) | Biosecurity | Soil | Freshwater | Biodiversity | Greenhouse gases | Animal health and welfare | Waste management | Resource planning/hazards mapping | Farm practices (e.g., winter grazing, stock exclusion) | Health and safety | Employment relations | Personal health and wellbeing | Engaged with governance | Community networks and support | Knowledge learning and skills |
| RMP Top 10 KPIs | | X | | | X | | | | | | | | | | | | | | | |
| B+LNZ Economic Service Survey Analysis | X | X | | X | X | X | | | | X | | | | | | | | | | |
| B+LNZ Farm Planning <i>Note: only environment module currently available</i> | | | | | | X | X | X | X | | X | | X | | | | | | | |
| MPI Good Farm Planning Principles: Towards Integrated Farm Planning | | | | | | X | | X | F | X | X | | X | X | | | O | | | |
| NZFAP | X | X | | X | | | | | | X | X | | X | | | | | | | |
| NZFAP Plus | X | X | | X | | X | | X | X | X | X | | X | X | | | O | | O | |
| Our Land and Water: MCDM Framework | | X | X | X | X | O | X | X | | X | | | X | X | X | O | | | | X |

x = attribute covered

O = attribute partially covered/or covered very briefly

F = attribute noted by organisation to be forthcoming in updated modules or versions of the framework

A review of the current approaches to evaluating hill country farming

What is being measured?

Table 1 shows that there are a variety of attributes of the farm system that are being measured and considered currently when evaluating the state of hill country farms. The selection of attributes each tool assesses often reflects the purpose of the framework and therefore no single framework covers all business, environment, and social components fully. Table 1 does show, however, that business and environmental metrics are integrated most commonly into monitoring and evaluation tools.

Of the business-related attributes, many are focused on financial success. For example, almost all of the RMPP top 10 KPIs for farm business are related to financial performance and stock performance. Similarly, the B+LNZ Economic Services Survey has been a longstanding method of assessing the state of the country's hill country farms and this is based around financial metrics. This approach stems from the historic association of financial success being correlated directly to the understanding of a "good farm". Other aspects of the farm business beyond these financial indicators are being integrated more recently into monitoring and evaluation tools, such as seen in the NZFAP quality-assurance programmes and the broader business risk-assessment criteria used in the Our Land and Water MCDM framework.

Most tools are assessing the environmental components of the farm to comprehensive, and increasingly higher standards. This is the result of new regulation regarding freshwater and management practices that require compliance, as well as the increasing awareness of the importance of environmental dimension of the farm system. Ecological health is now increasingly recognised as crucial for sustainable use of the land and therefore also longevity of the farm business. The two farm plan tools included in Table 1 (B+LNZ Farm Plan: Environment Module and MPI's Good Planning Principles) show how the emphasis of farm plans is often to meet these increasingly environmentally based regulatory requirements.

Beyond the farm-planning tools, there are industry assurance programmes that dictate the standard of products that farms produce. For example, NZFAP and NZFAP Plus assess the farm system with the goal of ensuring farmers are meeting the performance levels required to access premium product markets. These assurance programmes are consumer-facing accreditation schemes, therefore attributes of the farm system that are included in these tools are influenced more directly by social license and consumer demands. Therefore, these tools strongly cover both environmental attributes to meet consumer demand for environmentally friendly meat production, as well as business metrics that are related to export quality assurance, such as food safety and traceability of farm to plate supply chain.

Social attributes are not commonly measured

Social attributes of the farm system are shown in Table 1 to be included less commonly in monitoring and evaluation tools. Aspects, such as health and safety and employment relations, are included for the more recently released tools. The NZFAP Plus framework (released 2021), the Good Planning Principles (released 2021), and the MCDM framework (released 2022) all feature these dimensions. These dimensions, although people centred, are often fulfilled because of compliance/regulatory needs. Running the farm business without meeting health and safety and employment-relation requirements is a liability that is regulated by law.

There is significantly less coverage of social dimensions that are not legally required for the business of the farm to function. For example, personal health and wellbeing, community support and networks, learning, knowledge and skills, and engaging with governance are key dimensions of social resilience, yet they are not legally monitored. These aspects have not traditionally been valued in the same way that other business, social, and environmental dimensions have been and, therefore, are often missed from farm monitoring and evaluating tools.

The NZFAP Plus and Good Farm Planning Principles partially include some wellbeing aspects, such as encouraging the provision of wellbeing and mental-health resources where required to staff. However, of the tools compared in Table 1, the Our Land and Water MCDM framework covers social aspects the most comprehensively. The MCDM framework includes the consideration of quality of life and cultural values in their social wellbeing criteria. However, the whole MCDM framework is targeted to help farmers make complex decisions related to land-use change. Although we see this framework as highly valuable for farmers in this context, there is room for improved and expanded understandings of monitoring farmer wellbeing in the context of hill country farming.

Conclusion

There is clearly a gap in how current evaluation and monitoring tools understand hill country farming. Table 1 shows the dominance of business and environmental dimensions when measuring or considering quality assurance, sustainability, and planning. The implication of this is that the industry's conceptualisation of the "whole farm system" is skewed toward the physical farm environment for the purposes of sustaining a place of business.

In reality, as we think about adapting hill country farming to changing markets, climates, and social trends, the human elements of the farm system will be equally crucial to building resilience. The HCF framework contributes toward filling this gap in social metrics, particularly those related to a comprehensive understanding of farmer wellbeing.

Prototype of FarmSalus workshop activity for farmers

This is the initial prototype of Farm Salus. It is designed as an activity and discussion tool that would be used in a small farmer workshop setting. It would be guided by an experienced facilitator.

As an initial prototype, this workshop version of FarmSalus will continue to be developed by Beef + Lamb New Zealand in accordance with feedback received from stakeholders such as farmers and industry professionals during pilot testing. Therefore, the tool presented here is to provide an example of the type of content that FarmSalus provides and is subject to change.

Farmer workshop activity

Background

FarmSalus has been developed through a stakeholder-led process, which has been part of a five-year research programme called HCF. Between July 2019 and March 2020, the HCF Social Research Team talked to almost 300 people in 170 face-to-face interviews to ask what was important to them, what they thought the best hill country future could be, and how we might achieve that. From this research, we found that people working in farming felt unheard and/or misunderstood. We realised that there are many tools and surveys to monitor what is happening in farm production and performance, but nothing that specifically asks about the people and how you are feeling right now.

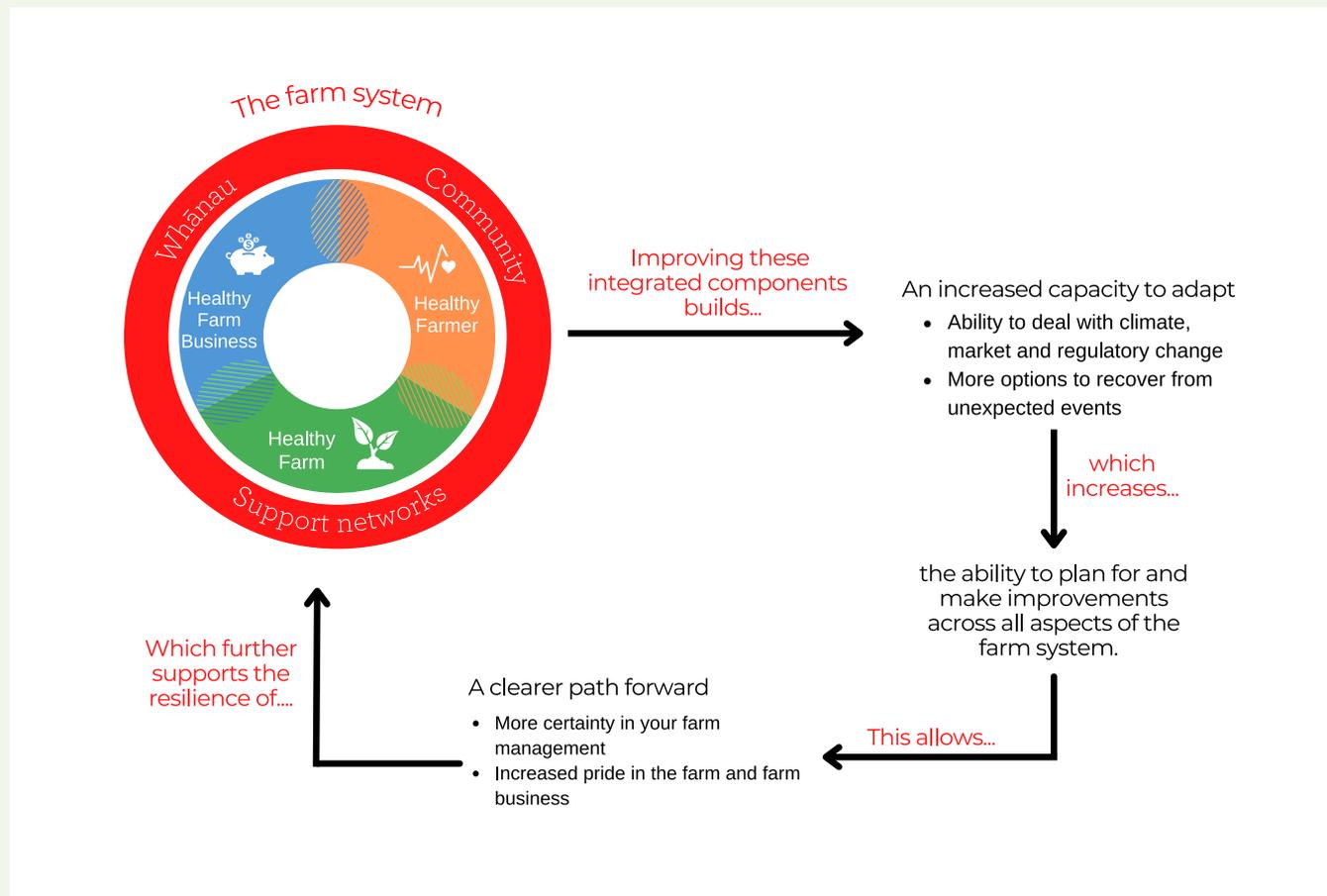


Figure 1: What is a resilient farm system and why is it important?

Through our interviews, we concluded that “future-proofed” hill country farming could be thought of as being founded on the success of three interconnected strands supported by the wider community and other **support networks**. The three strands are **healthy farmers, healthy business, and healthy farm environment**. Support networks include rural professionals, industry bodies, meat processing, and marketing companies.

Figure 1 illustrates how improving all of these components leads to a positive feedback loop that builds resilience or “future proofing” of the farm systems.

Purpose of this workshop

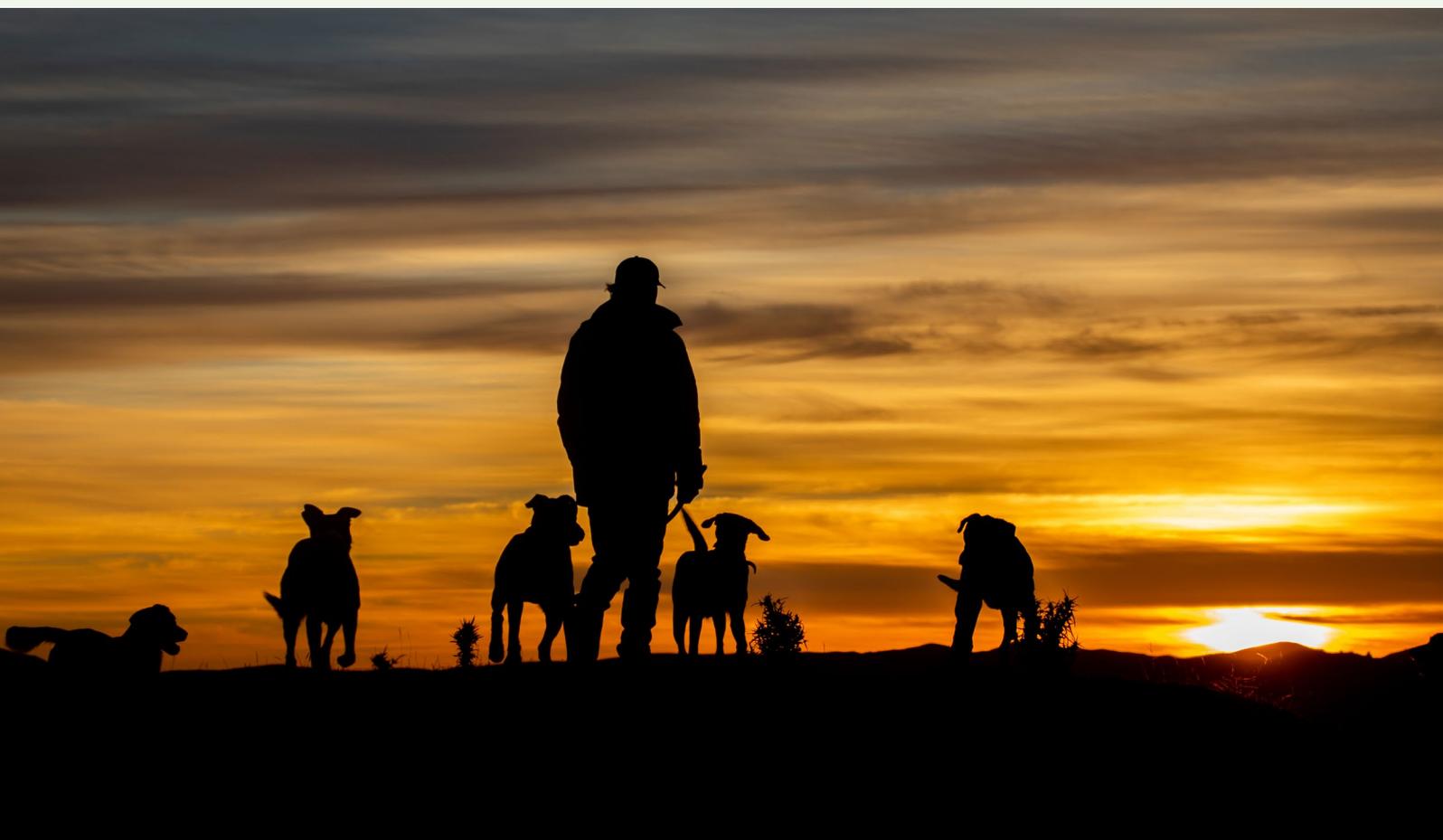
The purpose of this workshop is to encourage you to reflect on your wellbeing and future-proofing and identify areas of action for you to become more resilient.

There are four tables below, each with several metrics that help you to gauge important aspects of your wellbeing. These tables cover farm business health, farm environment health, your support networks and your own health.

We recognised that not everyone will have the same way of understanding their health and wellbeing. Therefore, at the end of each table, there is space for you to design your own metrics based on what you value the most. If you like, you can use the guiding questions below as a starting point for thinking about what these metrics could be.

Guiding questions:

- What makes you feel healthy and positive about your life?
- What values do you consider to be important to your health?
- What can you create that would help improve your wellbeing?
- Are there any key metrics that you think have been missed from the tables?





I'm concerned about the future costs of regulation and the impact on our farm business

Cost of regulation

No concerns about the costs of regulation, it's part of our business as usual



I prefer to play it safe and take less risks with my farm business

Personal risk profile (how much risk are you comfortable having?)

I am comfortable taking on more risk with my farm business, walking close to the edge does not bother me



There is low risk in our farm strategy

Current business risk (how much risk are you living with currently?)

There is high risk in our farm strategy



I am uncertain about how we will cope with market volatility

Coping with the markets

I'm confident that our farm business can soak up market volatility



Farm finance concerns keep me awake at night

Farm finances

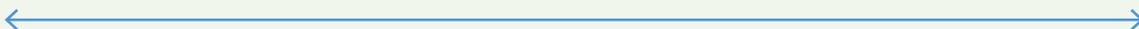
I sleep well, I am content with my finances and feel in control



We feel uneasy about the future of the farm. It's really hard to deal with and talk about

How prepared are you for farm succession?

We feel at ease about the future of the farm. We've got an agreed plan in place for the next generation/next step.



We are comfortable with the status quo. We have no need to make change.

Openness to adaption and change

We feel open to making changes - it's part of the natural way of things



What else about the business impacts your wellbeing?

Add some of your own metrics below.





Environmental health doesn't really influence or motivate my farm management and practices

Being in tune with the environment

I believe it's important to observe environmental health and change up my farm-management practices based on what the environment is telling me



I don't usually pause to notice or appreciate environmental health on the farm

Being present in the environment

I frequently pause to take in and appreciate and/or notice the environmental health on the farm



I am very concerned about how the farm will be affected with variability in the weather and seasons

Preparedness for increasing weather variability

I feel prepared and comfortable with how the farm will cope with weather and season variability



There's room for improvement, my animals aren't doing as well as they could be

Animal health

Very proud of our animals, they're doing as well as they could be



Not really a priority here, my journey towards making environmental improvements has not started

Environmental work and planning

My journey towards making environmental improvements is well underway. This is part of how we farm and is a high priority here



What else about the environment impacts your wellbeing?

Add some of your own metrics below.



My physical health is holding me back

Physical health

I'm feeling fit, healthy and pain free



I feel fatigued and lethargic

Energy and motivation

I feel rested and energetic



I am feeling misunderstood/ people don't understand me/us/farming

Feeling understood and valued

I am feeling understood/ people totally understand me/us/farming



My stress and worry feels unhealthy, is impacting my health, thoughts, relationships and sleep

Stress and worry

My stress and worry levels feel healthy, I can deal with stress in a healthy way and move on



I have nothing to look forward to, my sense of enjoyment and fun is zero

Enjoyment

I have so much to look forward to, I have a huge sense of enjoyment and fun



I feel pretty unsocial and isolated

Connected

I'm actively social and feeling connected



I am feeling hopeless, the future is bleak

Hope

I am feeling full of hope, the future is looking great



I am feeling like I'm controlled, I have limited choices

Sense of control

I feel in control, I have unlimited choices



**What else impacts your own wellbeing?
Add some of your own metrics below.**





Support

Mark on the scale where you would approximately rate yourself for each measurement

I feel like I've got to go it alone, I don't have anyone on farm who I can rely on to help

On-farm support

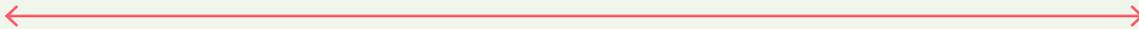
No concerns at all about having trusted support. My on-farm and off-farm team is exceptional



I'm sceptical about a lot of information that is supposed to help me. It's hard to find trusted information - it's hard to know where to look

Trusted information

I know where to go to find suitable and trusted information that will support my goals and aspirations on the farm



I don't really trust the people who are paid to support me - it's really hard to find trusted partners

Trusted partners

I've got really robust relationships with trusted people who support my best interests on the farm



My community is fragmented and in a state of decline

Community

My community is cohesive and flourishing



I feel like there is a lot of misunderstanding of what we are doing by society. I wish there was better understanding about what we are doing

Society

I'm confident that what society wants and how we farm is well understood and supported by society



What else about your community and support networks impacts your wellbeing?

Add some of your own metrics below.



