

# Sustainable Canadian Agricultural Partnership

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## Silvopasture In British Columbia Information Series

# Unit 4. Planning and Implementation





## **Acknowledgment**

This work has been funded by the Governments of Canada and British Columbia under the Sustainable Canadian Agricultural Partnership, a federal-provincial-territorial initiative.

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*Insert local indigenous territorial acknowledgment.*

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# Silvopasture in BC Information Series Content Guide



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0. Series Overview		
1. Introduction		1.s. History of SP in BC
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This workshop is part of a series on silvopasture in BC and builds on introductory material including the science behind silvopasture and silvopasture beneficial practices.

## Unit 4. Planning and Implementation

### Goal

Learn the importance of planning and setting measurable goals.  
Understand the five key areas to explore before establishing a silvopasture.

### Prerequisites

Module 3: Silvopasture BMPs.

### Content

1. Planning cycle as a foundation to manage risks;
2. Goals and management intents;
3. Assessing five key areas;
4. Evaluating your finances and resources;
5. Selecting a production setting and production system;
6. Evaluating support needed.

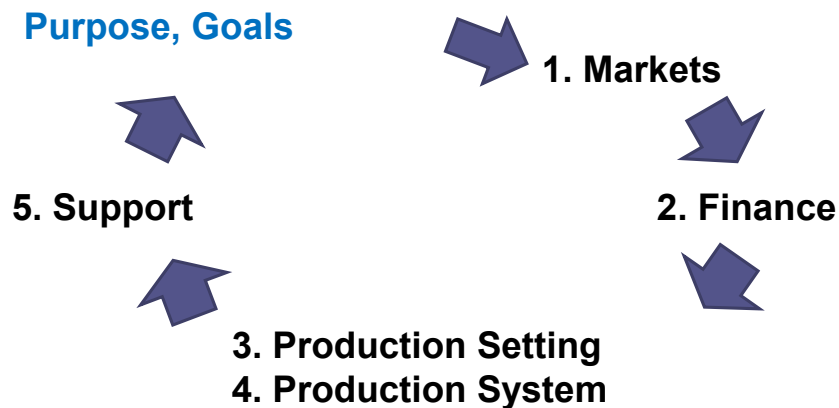


Establishing and operating a silvopasture means keeping abreast of many moving parts. Each which may come with its own set of risks and uncertainties. All of which can leave producers pondering where to start. The goal of this unit is to help you understand the importance of planning and the five key areas you should explore before establishing a silvopasture.

Before undertaking this unit in the silvopasture information series, it is recommended that you have completed the introductory material in Unit 1, and Unit 3 on silvopasture BMPs.

# Silvopasture Planning Cycle

Five things to know before starting your silvopasture journey



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Benjamin Franklin said that failing to plan is planning to fail. But planning without clear goals or management intents can be an exercise in futility.

If you want to put yourself on a path to success, there are five key areas you should explore before establishing a new silvopasture. This planning process requires setting goals, conducting an honest self evaluation of your resources and abilities, and doing some research into the available options for:

1. Markets;
2. Finances and Resources;
3. Production Setting;
4. Production Systems; and,
5. Support.

We'll begin by looking at the importance of setting goals and being clear about your management intents.

## Starting Point: Management Intent

### Think Through and Write Down Your Goals

#### Begin with a purpose: Why are you interested in silvopasture?

Production diversification? Generate an income stream or offset costs?

Climate adaptation? Other conservation benefits?

As a buffer or other landscape level tool?

A bit of each of these?



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### Set Goals

Start with a clearly stated goal or goals. Why are you interested in silvopasture? Is it production diversification? Or are you primarily seeking conservation benefits? Are you trying to generate an income stream or offset costs? As a landscape-level buffer or transition zone? Maybe you are looking for an integrated solution to contribute positively to many goals.

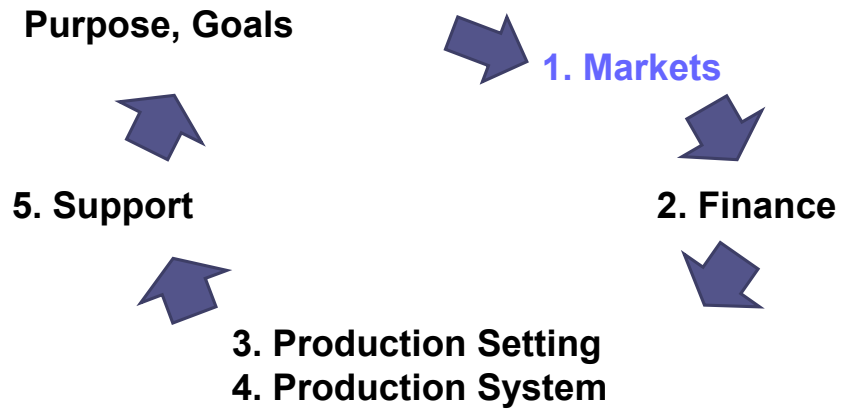
If you are having a hard time setting meaningful goals, that should be your cue to invest in some self-education and further explore options before advancing with your silvopasture design. The tree, forage and livestock species you include, and their arrangement in space and time can vary dramatically under different management intents.

For example, hybrid willows have incredible carbon sequestration potential with very rapid, early growth. But they have limited value for solid wood products and are too short statured to shade most livestock. As part of carbon offset goals they could be appropriate, but may not be suited to generating forest-product income or in enhancing animal welfare.

The design considerations for each scenario are therefore very different and linked to your management intents.

# Silvopasture Planning Cycle

Five things to know before starting your silvopasture journey



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Once you have established a clear set of goals, then work through each of these five planning areas to determine if silvopasture is the right management tool for you.

We'll start by assessing potential markets.

# Assess Markets and Marketing

## Structure & Scale Production to Addressable Market

Research Market Options and Outlets:

- **Commodity** Markets
- Specialty/**Niche** Markets
- **Experiences**

## Start at the Market and Work Back Towards Production



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Where and how you sell the ‘fruits’ of your labour can be the most important factor in the success of silvopasture or any agricultural endeavor. Producing livestock, shrubs or tree crops can bring satisfaction in, and of, itself. But if you can’t sell what you produce, your business will be compromised. For all but purely conservation driven uses of silvopasture, market considerations are so important, you should use them to filter your production interests up front. Start from the market and work backwards towards production considerations. Understanding your market outlets empowers you to make rational investment decisions.

Over or under investing can be equally fatal to a start-up, depending on the market you are trying to capture. At the risk of over simplifying, there are essentially three basic market outlets for production:

1. **Commodity markets** for food and fibres (including wood), where you are a price-taker;
2. **Specialty markets**, where you have restricted supply and can set prices. Although there are still upper bounds to what you can charge; and,
3. **Experiences**. Where you can capture revenue from customers that want to immerse themselves in the production setting or in what you are doing.

Some conservation-driven uses of silvopasture can still have market value as well; e.g. carbon credits. But they still require an understanding who is buying and for how much.

As a business your products may fit one or more of the market outlets e.g. a specialty or locally-branded product, one of the market elements of which, is the experience or story of production.

# Assess Markets and Marketing

## Structure & Scale Production to Addressable Market

- Create a **Marketing Plan**



- Target markets
- Range of sales
- Minimum volumes
- Quality considerations

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### Explore Marketing Options

After your initial exploration of markets, start outlining a formal marketing plan. This plan should include your target markets and expected range of sales. Also, importantly, note the minimum production volumes and quality considerations attached to these markets.

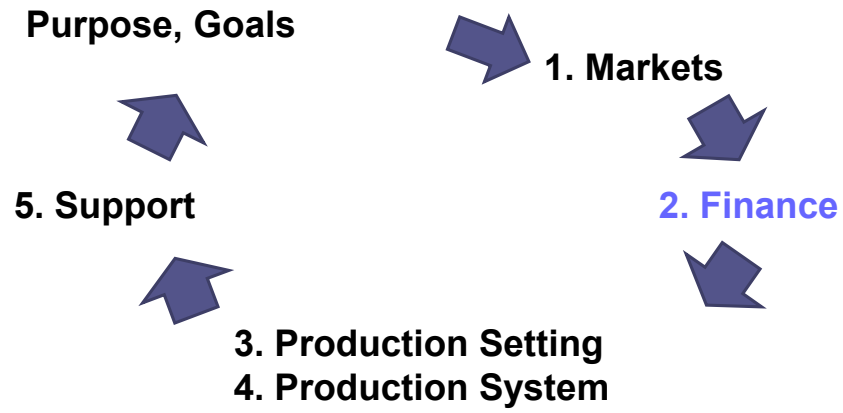
For many silvopastures in BC, this could be a relatively simple strategy of selling raw logs to a regional forest product manufacturer and livestock through auction. Although, with some attention to how you produce the trees, you can position your logs for higher value markets seeking veneers or clear (knot-free) wood. Similarly, livestock have many niche market opportunities from wholesale to direct-to-consumer.

### Scaling Your Operation

After you explore and categorize the markets and marketing options, you need to plan the scale of your operation. Scaling and structuring your production to an addressable market with a solid marketing plan is crucial to ensure viability. Scale production too small for a commodity market, and you may not have enough income to offset costs. Scale production too large for a niche market and you may be sitting on a pile of unsold, sometimes perishable, inventory.

# Silvopasture Planning Cycle

Five things to know before starting your silvopasture journey



Once you have an idea of where you can market your output, the second area to explore is financing your silvopasture.

# Finance

## How Will You Pay to Establish and Run Your Operation?

### Start-up Funding

1. Self-funded;
2. Corporation or partnership, and sell shares;
3. Obtaining a term loan or line of credit.



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## Finance

Options for agroforestry finance don't differ greatly from those for other agricultural or forestry ventures. But, after you select a target market and outline a marketing strategy, finance is your next most important consideration. And you should have a financial plan in mind before making production and investment decisions.

How much up-front finance you will need, and where you source it from, will determine if you can get your silvopasture venture off (or in) the ground. Silvopastures always involve a perennial tree or shrub crop. Therefore, you must secure patient capital. The options being:

- Self funding (using savings, other sources of your own capital);
- Setting up a corporation or partnership, and selling shares (a solid business plan and/or prospectus will be mandatory and some good luck sometimes required);
- Obtaining a term loan or line of credit (requires a bullet-proof business plan). Also remember that financial institutions may not necessarily understand agroforestry.

## Finance

### Other Financing Considerations

- **Cash flow needs:** costs up front, but returns may not start until years later.
- **Cost savings:** may not materialize until the silvopasture is well established.
- **Utilizing existing resources:** how does production fit with your equipment, facilities, labour pool?
- **Diversify, don't Di-worse-ify.**



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### Other Financing Considerations

Understand your short- and long-term cash flow needs. Christmas trees, ornamental and fruit crops may require 5 to 8 years from planting until the first harvest. Fast growing forest trees for pulp wood or chips can take 20 to 30 years to mature in BC. And veneer logs and even some lumber species can take 80 to 100 years before harvest is considered.

Delays may also be encountered in the anticipated cost savings from your silvopasture that only develop over time. e.g. soil moisture conservation.

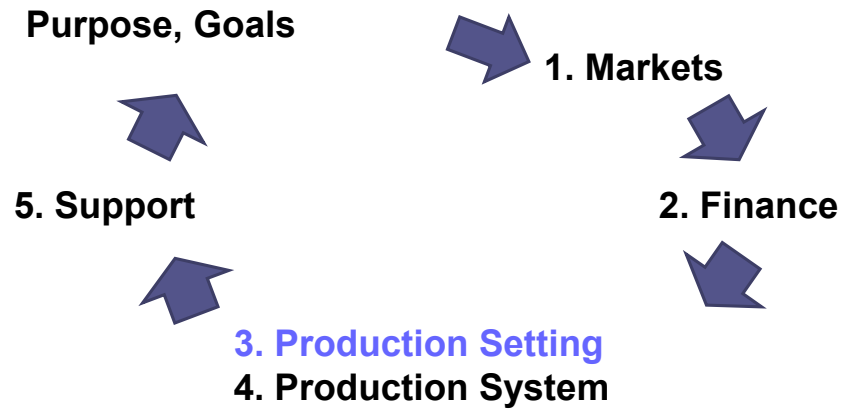
This puts most long-term perennial crops in a precarious economic position. This is because investments made early for planting and stand tending may not see a direct return until many years later. All the while inflation eats away at your returns. This however, is where silvopasture can shine, by generating short-term cash flows from blending forage crops and livestock with the long-term investment in woody perennials. The cash returns generated annually can offset the discounting for your long-term investment, making the whole venture more economically viable.

Other considerations are how your silvopasture production schedule will match your existing equipment, facilities and labour pool. Will it complement or strain your resources?

Finally, a note of caution about using silvopasture to diversify your existing operation: diversify, don't di-worse-ify. One of the strengths of agroforestry production is that the work loads for the 'agro' and 'forestry' components can often be complementary. That is, the peak demands for production tasks, management and marketing can fall at different times of the year. Without some forethought and planning, however, the opposite can occur. You will 'di-worse-ify' your operation when the time and resources you need to devote to your new venture, eats into production and/or profitability of your core business.

# Silvopasture Planning Cycle

Five things to know before starting your silvopasture journey



We now turn to looking at the production setting for your silvopasture system.

# Silvopasture Production Setting

## Private land, Lease or Crown Licence?

- Private land (and some leases): more control over management setting and operations.
- Crown lands: need to adhere to legislatively required licenses, planning and permissions.



### Private Land

On private land, as well as some long-term leases, you will have more control over your management setting and operations, but there are still zoning and regulatory considerations you should review to ensure all aspects of your silvopasture will be safe and legal.

The planning assessment needs to include everything from your ability to get a stock water or an irrigation license, adhering to required setbacks, following mandatory plant and animal health standards, and work windows for water developments or spreading soil amendments.

### Crown land

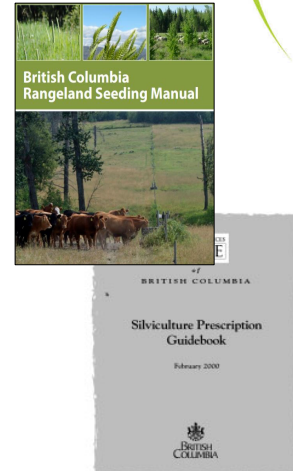
On a per area basis, most silvopasture activity in BC occurs on Crown lands, through overlapping range and forest tenures. The Crown-land silvopasture examples we will talk about in this series originated with both existing range and forestry tenures, and tenure holders. In general, although overlapping range and forestry tenures may be held by the same individual or business, more typically they are held by different entities. For example, a ranch business may hold a range license over a specified area with a timber company holding the forest license.

As a general rule, the more complex your management goals, the longer and more involved the Crown land planning process will be. Early and continuing discussion and exploration with your FOR district is critical to considering any silvopasture project on Crown land, and how and if it might move forward and be implemented.

# Silvopasture Production Setting

## Can I Grow What I Can Sell?

- Livestock: adaptable; consider water and predators.
- Forages: start with BC Rangeland Seeding Manual.
- Trees and shrub: adaptation to your farm site is key, start with Plant Hardiness Zones.
- Tree species selections can be obtained from provincial Silviculture Guidebooks.



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Working from your assessment of market and financing opportunities (“What can I grow that will sell?” and, “What can I grow within my financial capacity?”), you should have a short-list of crops and livestock of interest. More homework is now in order. Now it is time to explore if you have a suitable growing environment, and the necessary infrastructure, equipment and other resources in place.

Assessing your production *setting* starts by understanding the biophysical setting. All plants and animals, fungi and other life have a range of conditions in which they can survive. And their adaptation is governed by a host of factors. These include the annual range of temperatures, frost-free period, amount of sunlight, rainfall and the type of soils.

Any livestock you will likely consider for production in BC will have a wide enough adaptation to fit within most settings. That is, as long as you attend to providing sufficient food, water, shelter and other animal welfare concerns.

Forage crop recommendations for various regions in BC are available in guidebook and online seed selection tools. A good place to start is the BC Rangeland Seeding Manual, which contains specific recommendations for silvopasture settings.

For trees and shrubs, adaptation is encapsulated in plant hardiness zones. These rating systems in use in Canada and US match different plants to the broad patterns of climate across the continent. Note that the Canadian and US plant hardiness zones are not identical/equivalent.

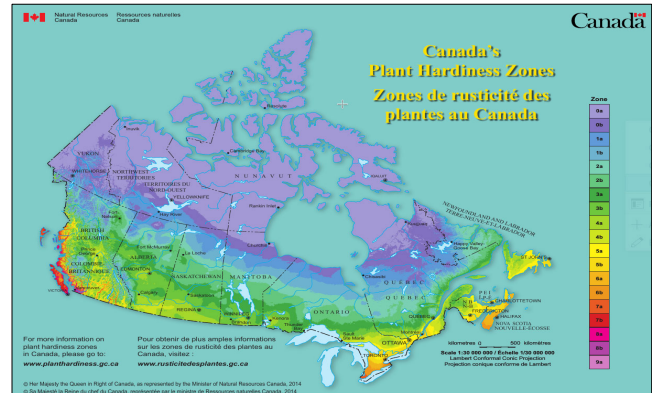
Recommendations on commercial tree species selection should be obtained from a qualified professional, and on Crown land this is mandatory. Some guidance is also available in provincial Silviculture Guidebooks, available from the BC Ministry of Forests.

# Silvopasture Production Setting

## Can I Grow What I Can Sell?

### Plant Hardiness Zones

- You want your crops to **Thrive**, not just **Survive**.
- Hardiness zones don't consider microclimates.



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Plant hardiness zones (PHZs) are a good starting point for assessing if a tree or shrub species can be grown at your site, but they don't tell the whole story. PHZs do not differentiate between the ability to survive in a given location, versus growing well. And you want your woody crops to develop, bear fruit and mature, not just live.

Hardiness zones also do not consider microclimate. Microclimatic factors may make a given production setting more, or less suited to a given crop.

For trees planted for timber or other forest products, you may need to consult with a qualified professional to get appropriate detailed species and planting stock recommendations. Likewise, if your silvopasture includes horticultural species (e.g. fruit or nut trees) you may want to consult with a professional Agrologist to get very specific planting stock recommendations.

# Silvopasture Production Setting

## Site Preparations and Modifications

- Deficiencies can be overcome by inputs and other investments, but think cost-benefit.
- Agroforestry system will modify microclimate and resource availability as it matures.
- Sometimes you need to 'nurse' new plantings.



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Site deficiencies for the suitability of your crops are not always an absolute barrier to their production. Site modifications and inputs can be used to improve the suitability. For example,

- Water deficits can be overcome with irrigation;
- Topography and soils can be amended to overcome inadequate drainage or soil compaction limitations; and,
- Shade cloth can help young plants survive in the open.

In other words, if the cost-benefit makes sense, limitations can be overcome with investments in inputs.

Silvopasture is itself an act of modifying the growing conditions in the understory. As your silvopasture matures, therefore, the trees and shrubs can become a significant factor overcoming site limitations and creating favorable conditions for a wider range of forage crops.

You may however, need to 'nurse' new crops along until those changes occur. For example, supplemental water may need to be supplied by irrigation in the first few years until tree or shrub roots are large enough to access lower soil profiles. This however, will front-load more costs on your silvopasture, and should be factored into an overall cost-benefit analysis.

# Silvopasture Production Setting

## Other Considerations for the Location

- Climate Change: long-lived crops must consider beyond today's suitability.
- Assess if key infrastructure and other resources in place (e.g. water).
- Can you meet all the federal and provincial regulations, local by-laws?



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Some other considerations when assessing your production setting include:

### Climate Change

Your assessment must also factor in the impacts of climate change. With very long-lived tree and shrub crops, you need to look beyond today's conditions and patterns. Depending on your production goals, you may be trying to match the climate of 10, 20 or 100 years from now. Planting for yesterday's potential can result in failure, as can jumping too far ahead into the climate change projections.

### Key Infrastructure

An evaluation of the production setting should also consider the availability of key infrastructure or specialty equipment. This links back to the financial planning step. It may take a few planning iterations to find the right crop and livestock combinations to match your resources. Human resources (labour) also need to be examined in the same context.

### Regulations

Whether operating on Crown land or on private land, you also need to understand the full range of regulations that will apply. Buffers and setbacks, for example, impacting where livestock can be pastured or trees can be harvested, can have a disproportionate impact on small-lot silvopasture. Reviewing your legal obligations ahead of time can prevent major disruptions to operations after you are already in production.

# Silvopasture Production Setting

## Existing Land Cover and Use

### *Establishment Costs Vary Greatly*

- Planting into a brown field or green field
- Thinning and pruning an immature forest
- Thinning and pruning a mature forest



Lower costs by not clearing entire area.

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The starting point of existing land cover and use, and intended establishment pathway, also needs to factor into the silvopasture design you choose.

Starting from cultivated land or an existing perennial forage crop, will load the establishment costs and development lag onto your tree / shrub crop.

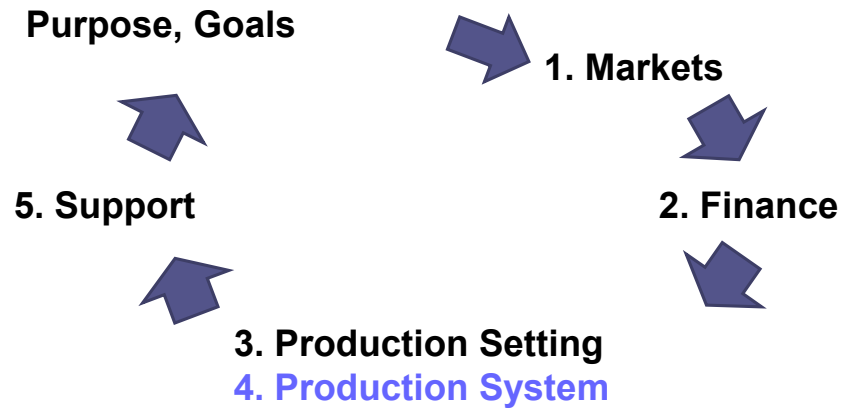
Starting from immature forest cover has the advantage of leveraging advanced growth on the long-lived woody species, but also may incur extra input costs to create suitable seed bed for the forage zones.

Harvesting a mature forest to create your silvopasture keeps the tree establishment costs to a minimum, but it also requires extra input costs to create the forage zones relative to a green field. An advantage though, is that some merchantable timber sales from clearing may offset the other costs.

Certain design configurations can also add or reduce costs to your silvopasture start-up, as in the example at Big Bear Ranch, where woody debris and rocks from land clearing were placed in the timber belts. This represents a significant cost saving relative to clearing the entire area, and then planting zones back to either trees or forages.

# Silvopasture Planning Cycle

Five things to know before starting your silvopasture journey

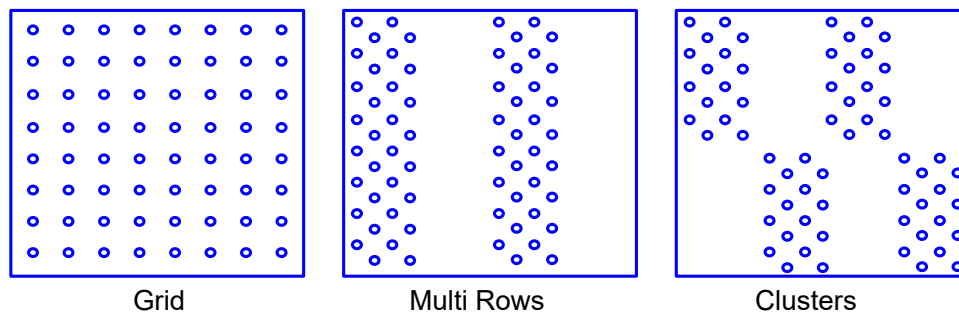


We now turn to looking at the specific silvopasture configuration and components to use.

This step, out of necessity, is likely very closely tied to the production setting considerations. In practical planning terms therefore, steps three and four can occur at the same time.

# Silvopasture System Design

## Three Patterns, With Many Variations



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As a review, there are three basic configurations for silvopastures, but with many planting variations possible within those configurations.

1. Grid Design: trees and shrubs are equally spaced, in both directions, across the silvopasture.
2. Multi Row Design: trees and shrubs are arranged in rows alternating with forage zones in strips.
3. Cluster Design: trees and shrubs are arranged in groups alternating with forage zones in patches.

### Variation comes from how:

- Tree/shrub rows are oriented;
- Trees/shrubs within rows or clusters are arranged,
- Trees and shrubs are spaced; and,
- Relative proportions of individual species in both zones.

# Silvopasture Production System

## Choosing a Silvopasture Design



Consider three main elements:

- **Intent** (reason for using silvopasture, your management goals);
- **Components** (trees/shrubs, forage, livestock, secondary production); and
- **Interactions** (managing critical points of the development phases)

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To guide your design, focus on three things:

- Intent;
- Components; and,
- Interactions.

We've already covered the first consideration in design: Intent is your purpose, your goals. It is the first step in an exploration of your silvopasture venture. Be clear about why you want to use silvopasture, before you decide how to use silvopasture.

The second focus is components. Following the suitability screening just outlined (or some fixed elements brought by your existing livestock production, or trees and shrubs that are already growing on site), you now have some existing and candidate components. More sophisticated silvopasture designs may also blend in secondary crops from the trees (e.g. fruit, nuts, sap).

With intent and components identified, you now need to map out potential interactions. This is done so you can actively manage them; and, the management emphasis is set by your intent. It is also very important to remember that the nature of the interactions can change as a silvopasture matures.

# Silvopasture Production System

## Map the Key Interactions



	Tree-Forage	Tree-Livestock	Forage-Livestock
Herbaceous	Critical	Critical	Important
Intermediate	Normal	Important	Normal
Arboreal	Critical	Normal	Normal

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Recall that successful silvopastoral management revolves around managing the **critical** interactions:

1. In the Herbaceous Phase, tree seedlings are subject to strong, direct competition with understory crops. They are also most susceptible to direct livestock impacts.
2. Once at the Intermediate Phase, trees have extended their canopy above the herb layer and competition is generally limited to soil-based resources (i.e. water and nutrients).
3. In the Arboreal Phase, mature trees become the dominant elements in the system in terms of both size and resource use. And they control the availability of most resources as well as the understory microclimate.

# Silvopasture Production System

An example mapping of interactions: dairy cattle with a high-value hardwood



Phase	Trees	Forage	Livestock
<b>Herbaceous</b>	Competition; vegetation press; trampling damage	New stands susceptible to overgrazing	Trees not palatable: grazing reduces competition; Supplemental shelter
<b>Intermediate</b>	Soil-based competition; soil compaction	Improve soil tilth and nutrients	Grazing reduces competition; Supplemental shelter
<b>Arboreal</b>	Open-grown trees have poor form.	Light limits production.	May 'loaf' and overgraze sheltered areas

We will use an example of a Fraser Valley dairy farm that wants to plant an existing cultivated field into a silvopasture with the intent of providing shade for the animals in the mid- and long-term, and eventually harvest high-value hardwood in the long-term.

In the herbaceous phase the biggest concerns are in tree-forage and livestock-tree interactions. Depending on species the trees may or may not be palatable to the cattle, but any use of the new silvopasture will come with a risk of trampling damage. Small trees present will not provide animal welfare benefits, therefore at this phase supplemental shelter may be needed.

At the Intermediate phase most of the interactions are positive or can be addressed with conventional BMPs for grazing and forage management.

In the Arboreal Phase, mature trees will require some pruning to maintain forage production, but that will not have a strong effect on spatial arrangement of the trees at the design stage. The pruning will also help keep good tree form. Livestock may require additional handling to prevent loafing and overgrazing in sheltered areas.

# Silvopasture Production System

Design Choices – dairy cattle and high-value hardwood example

## Herbaceous Phase

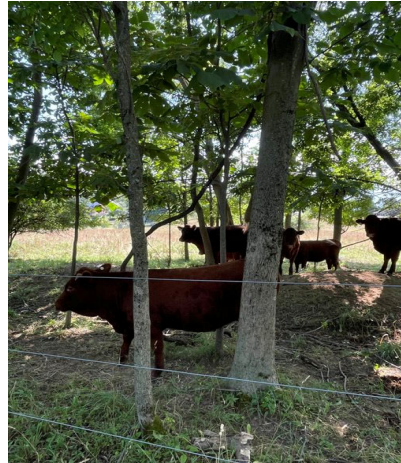
- Spatial design will not overcome critical interactions
- Use grazing for competition and tree guards to prevent damage

## Intermediate Phase

- No interactions to manage.

## Arboreal Phase

- Pruning for tree form and light; or,
- Clusters or multi-row arrangements.



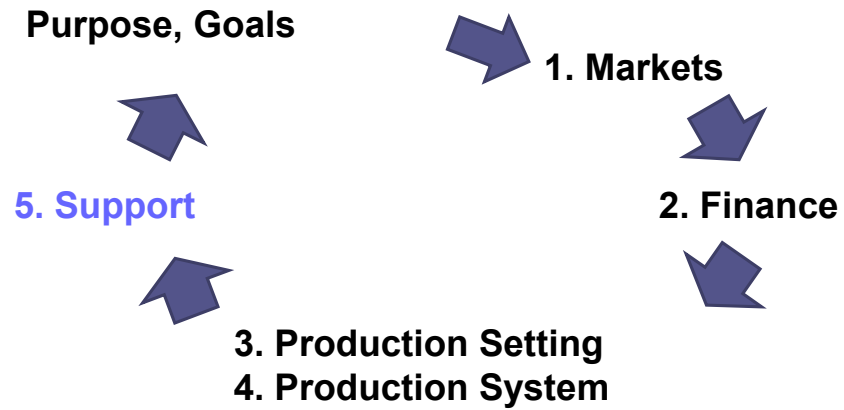
Looking at the intent and components in our example we can draw guidance for the appropriate silvopasture design:

1. In the herbaceous phase interactions, the specific spatial design will not overcome the two main interactive issues (competition, trampling damage). The tree seedlings grown are relatively valuable and are being grown for wood products, with the quality of the wood produced a factor in value. Grazing, therefore, is a suitable choice for relieving competition if coupled with installing individual tree guards to prevent trampling.
2. At the Intermediate phase there are no significant interactions to manage that would guide your decision on design.
3. In the Arboreal Phase, mature trees will require some pruning to maintain good growth form, and to relieve competition for light in the understory. Clusters or multi-row arrangements both would reduce the amount of management inputs at this phase and will also serve the goal of providing shelter for the livestock.



# Silvopasture Planning Cycle

Five things to know before starting your silvopasture journey



The final planning step is to look at what level of support you will need and whether you can achieve this internally or if you will require outside help.

# Silvopasture Support

Where to Turn When You Need Help Moving Forward



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Dedicated silvopasture support **is not as well established as other agricultural options and can be** a bit of a challenge in implementing these practices.

This unit and series are part of a strategy for increasing information and training relevant to using silvopasture in BC. But for both those new to agroforestry, and those not so new, it bears remembering that silvopasture management may require more of a ‘do it yourself - DIY’ spirit than other elements of your farm or ranch enterprise, and that support may be derived from numerous sources pieced together.

There is support available for assorted elements which may contribute to your silvopasture plan, including business planning support, grazing management resources, the environmental farm plan and beneficial management practices programs. Since agroforestry blends agriculture, forestry and conservation functions, both information and tools, and potential support may originate across any of these disciplines.

# Silvopasture Support

## Self Evaluation

- Leverage your own knowledge and skills.
- Make your plans adaptive and resilient.



You have knowledge and skills.

You may likely need new knowledge and skills as you venture in the world of silvopasture. There is not a detailed production guide (yet) to help you move forward.

Whatever plans you make therefore, need to be adaptive and flexible. Silvopasture systems are dynamic and resilient. You and your plans need to be a bit of both too.

## Group Discussion

### Share Your Experiences

Positive or negative outcomes from your silvopasture work help others assess suitability and build a more successful plan.



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*Group or panel discussion.*

### Share Your Experiences With Others

BC has a long history of forest grazing, and some producers have been using silvopasture for decades in a variety of production settings.

Help us develop and refine the information available to other producers, managers and policy makers. Share your positive or negative outcomes from using silvopasture.

# Silvopasture Support

## When Do You Invest in Support?



### Self-Education vs Professional Assistance

	DIY, Invest in Self Education	Professional Assistance
Frequency of Information Needs	Ongoing	One-time or Special Situation
Regulations, risk management	Low	High

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Separating your support needs into one-time versus ongoing, can help you decide if you want to invest in outside help or invest in your own education. There is a large body of free information out there for you to sort through. Learn from others that are using silvopasture successfully. And, equally informatively, find someone who has faced challenges.

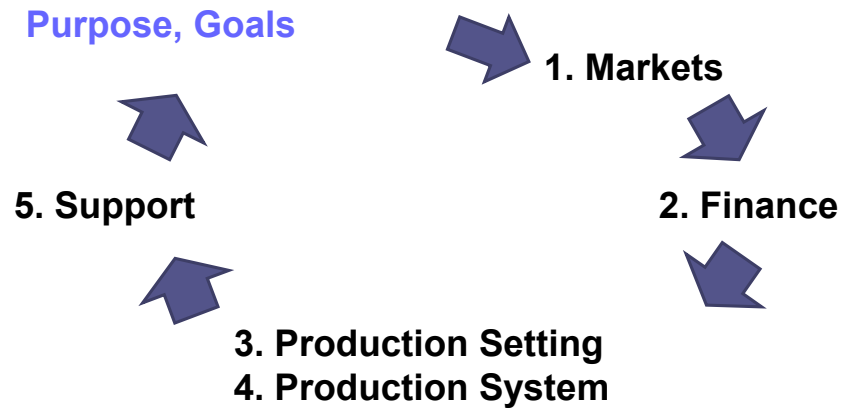
Investing in your own education reduces the need to keep turning to outside support. But if silvopasture is a part of a side venture, remember that your time has value elsewhere: diversify, don't di-worse-ify.

On Crown lands, you may need to work with qualified professionals to develop the required management plans. With the implementation of regulations under the Professional Governance Act, agroforestry is a protected practice within the profession of Agrolgy. This Act applies to both private and Crown lands, and you will need to assess when you may need the support of a qualified professional such as a Professional Agrolgist, Registered Professional Forrester or Professional Biologist. Remember that silvopasture integrates agronomic principles, practices and production with both forestry and conservation management approaches. In general, if carried out on 'farmland' (private land) you can still make plans for your own operation, but not for anyone else unless you have the appropriate qualifications.

If professional support is needed, it is always more cost-effective after you narrow the options under consideration. You will get better, more focused advice, if you do at least some of the leg-work yourself. For ongoing support needs, investing in self education is probably the best course of action. Even if this results in delaying getting your silvopasture established.

# Silvopasture Planning Cycle

Five things to know before starting your silvopasture journey



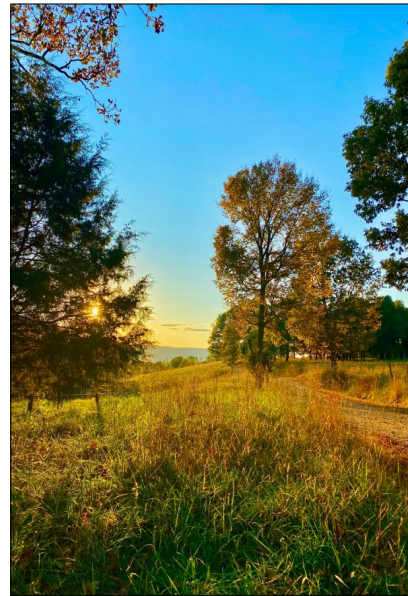
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We've come full circle in the planning process.

You now have an appreciation of all the pieces to get started with an honest evaluation of your potential silvopasture. In contrast to moving ahead, one outcome may be that you decide you don't have enough information, resources or support to meet your goals. This is a valid and valuable planning outcome to avoid costly mistakes.

As with all good plans, come back and periodically review your goals and evaluate if you are achieving your stated purpose. If needed, you can work through the steps again to adjust your management pathway or start over.

## Questions and Discussion



*Final question and answer break.*