

# **Incorporating a Farm Viability Approach into Farm Conservation**

**Massachusetts Land Trust Coalition Annual Conference**

*Jamie Pottern, Benneth Phelps, Vanessa Johnson-Hall, Kathleen Doherty  
March 13, 2026*

# Learning objectives

1. Participants will learn why farm viability is important to conservation outcomes, and how to incorporate farm viability considerations into their project planning for acquiring conservation restrictions.
2. Participants will learn how to think strategically about what land, buildings, and assets to include or not include within the restriction area.
3. Participants will learn best practices for incorporating farm viability considerations into conservation restriction language and be provided with relevant contacts and resources.

# Outline

1. Introduction
2. Making the case for farmland protection and farm viability
3. Defining terms
4. Framing viability principles through the life cycle of a conservation project
5. Case studies
6. Discussion

# The Carrot Project - Who We Are

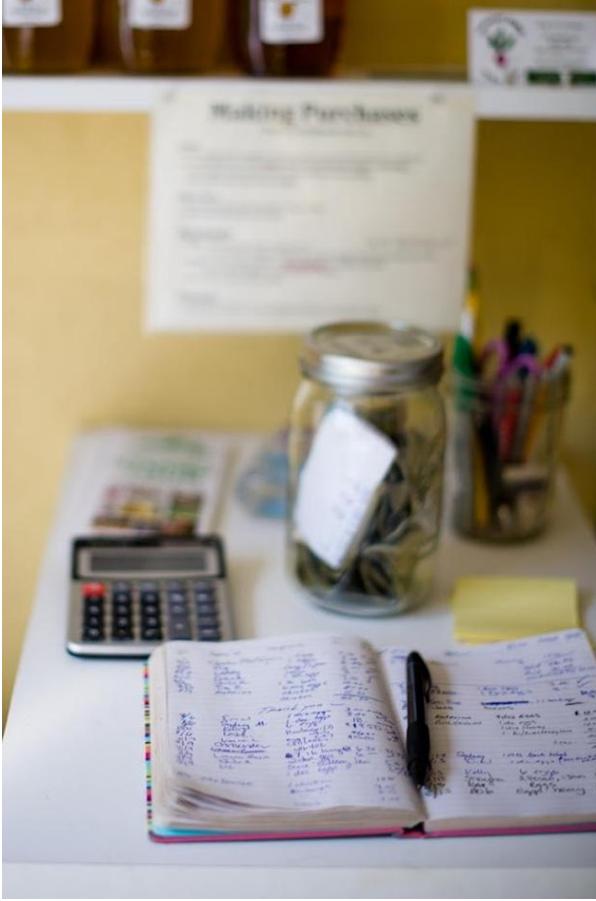
The Carrot Project combines on-the-ground programs serving food and farm entrepreneurs, with research, collaboration, and advocacy creating transformational change on farms, across our New England region, and at a national scale. We do this by providing information, training, skill-building, and capital, within a carefully crafted ecosystem of support.

## Our Vision

The Carrot Project envisions a resilient farm and food system, where successful farms and agricultural businesses are increasing in number and diversity, and are contributing to New England's economic, environmental, and social well-being.

We address the most important gaps at the intersections of financial security, financial barriers to farmland access and transfer, and farmers' ability to weather major disruptions.

# The Carrot Project Offers



## Services focused on the business of farming:

- Business Advising & Coaching
- Training
- Loans & Capital Readiness

## For each client:

- Individualized, in-depth, 1:1, multi-year services
- Access to career business advisors with farm and food specific expertise



# Greenbelt

Essex County's Land Trust

Greenbelt is a nonprofit, member-supported land conservation organization working only in Essex County whose mission is to protect the natural land and working farms across Essex County forever.

Over 22,600 acres permanently preserved since 1961, including over 5,000 acres of working farmland

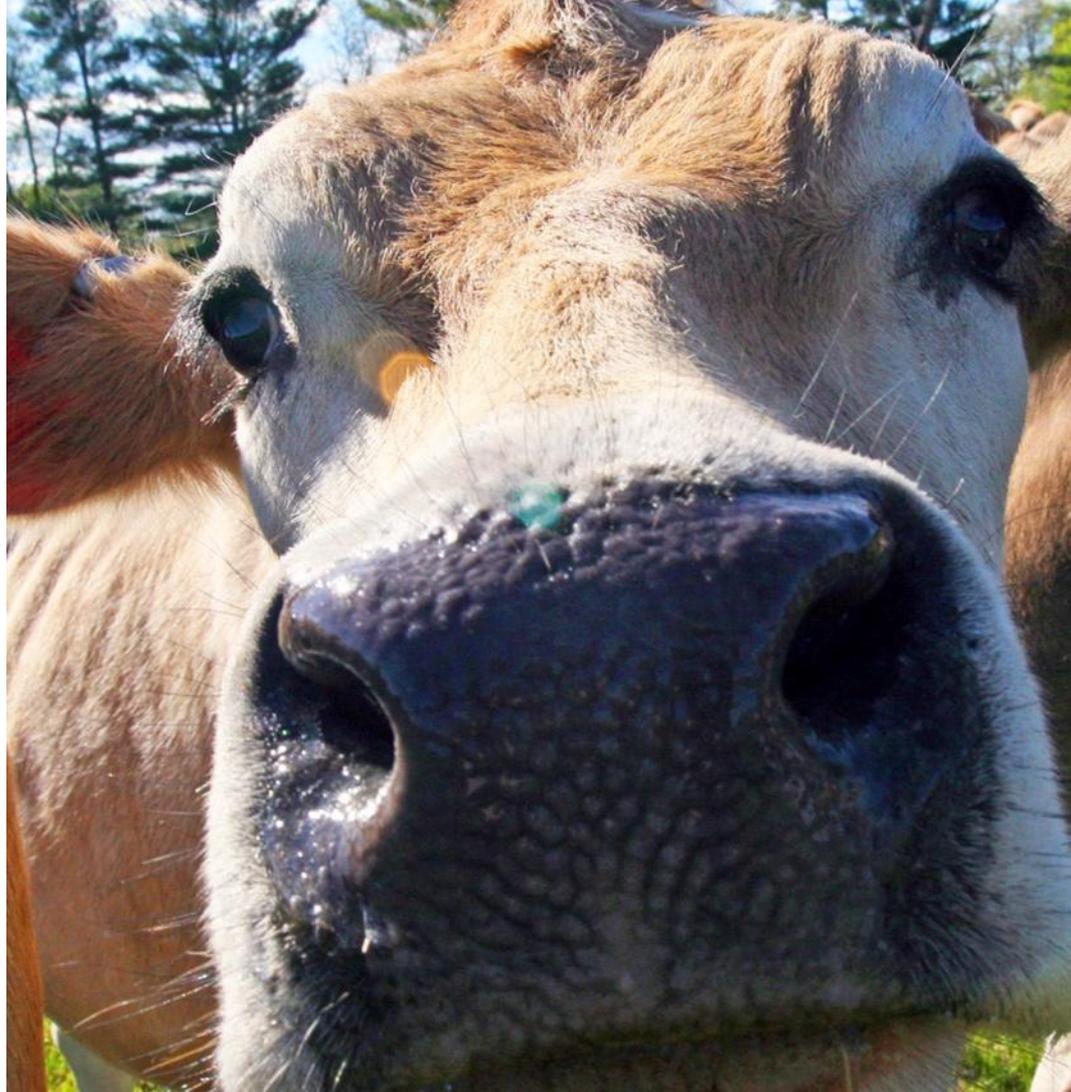


# American Farmland Trust

Saving the land that sustains us by:  
protecting farmland,  
promoting sound farming practices,  
and keeping farmers on the land.

# Poll: Who is in the room?

- Does your org currently protect farmland? Does your org want to protect farmland, but you don't yet?
- Do you protect farmland through holding easements?
- Do you protect farmland through fee acquisition?



# Making the case for farmland protection and farm viability

# Why care about farms?

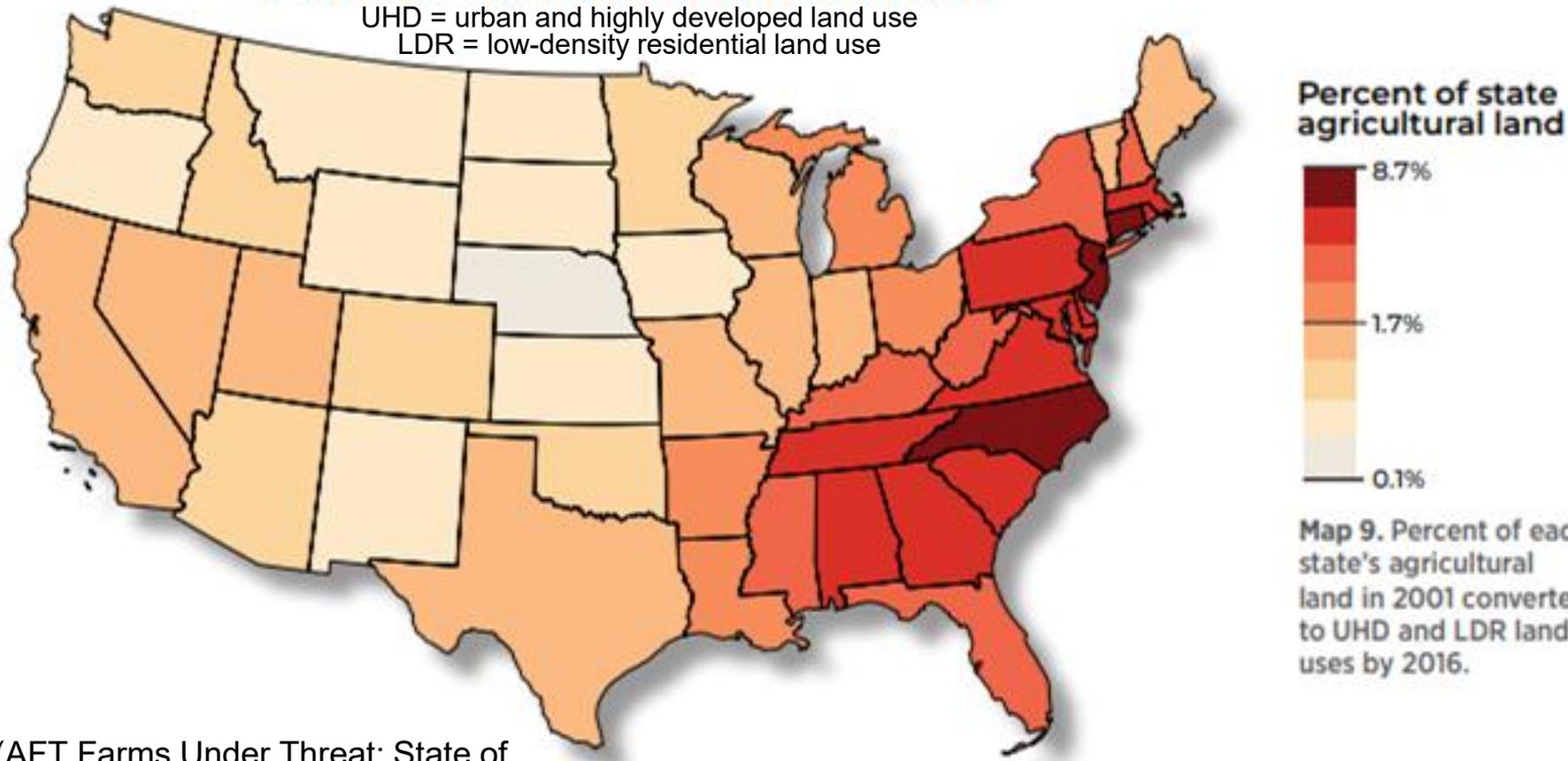
- Farms produce food!
- Farming and agritourism bring jobs and visitors
- Farms require fewer public services than residential land use (even with lower tax rates on farmland)
- Farmland soil is a unique natural resource
- Farms can support biodiversity
- Protected farmland helps mitigate climate change
- Recreation opportunities

**New England is  
losing farmland  
faster than the  
rest of the country**

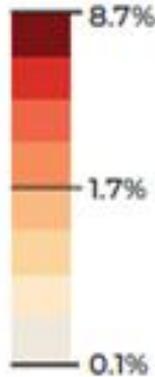
## Percent Conversion to UHD and LDR

UHD = urban and highly developed land use

LDR = low-density residential land use



Percent of state agricultural land



Map 9. Percent of each state's agricultural land in 2001 converted to UHD and LDR land uses by 2016.

(AFT Farms Under Threat: State of the States, 2020)

## Percentage of agricultural land converted, 2001-2016

1	New Jersey	8.7
2	North Carolina	6.7
3	Connecticut	6.4
4	Delaware	5.8
5	Rhode Island	5.8
6	Massachusetts	5.2

Source: *AFT Farms Under Threat: State of the States, 2020*

## Farm real estate values, 2025 (\$/acre)

1	Rhode Island	\$22,500
2	New Jersey	\$16,600
3	Massachusetts	\$14,900
4	Connecticut	\$14,400
5	California	\$13,700
-	US average	\$4,350

USDA NASS 2025

# Farmers need housing

# Top challenges for young farmers

1. Access to land
2. Access to capital
3. Health care costs
4. Cost of production
5. Housing



“33% of young farmers reported that **finding or maintaining affordable housing was ‘very or extremely challenging’** (42% of BIPOC young farmers)”

2022 survey by National Young Farmers Coalition:  
<https://youngfarmers.org/policy-change/policy-overview/>

# Housing shortage

"The New England region faces an unprecedented shortage of housing at all levels – everything from affordable rental units, to middle-income single-family homes. The shortages are having a negative impact on the region's economy."

<https://www.newenglandcouncil.com/issues/housing/>

# Farms need infrastructure

**What counts  
as impervious  
surface?**



Hay barn with no flooring.  
Photo from Troyer Post Buildings.



Hoop house with plastic removed.  
Photo from Sustainablemarketfarming.com.



Heavy use area protection around  
livestock watering hole in pasture.  
Photo from USDA-NRCS.



Silage bunker and barn on a dairy farm in Lebanon, CT.  
Photo from Google.



Wash and pack station at Longview Farm in  
Plymouth, NH.  
Photo from UNH Extension.

**Different farm  
types need  
different  
infrastructure.**



Farm infrastructure, including anaerobic digester, at Barstow's farm in Hadley, MA.

Photo from Vanguard Renewables.



A robotic greenhouse with plants growing in the soil, in Sackets Harbor, NY.

Photo from North Country Public Radio.

<https://www.northcountrypublicradio.org/news/story/44377/20210903/robot-farmers-pioneer-climate-resilient-farming-in-the-north-country>

What kind of infrastructure might be needed in the future?

**Most farmers are  
not making money  
from farming**

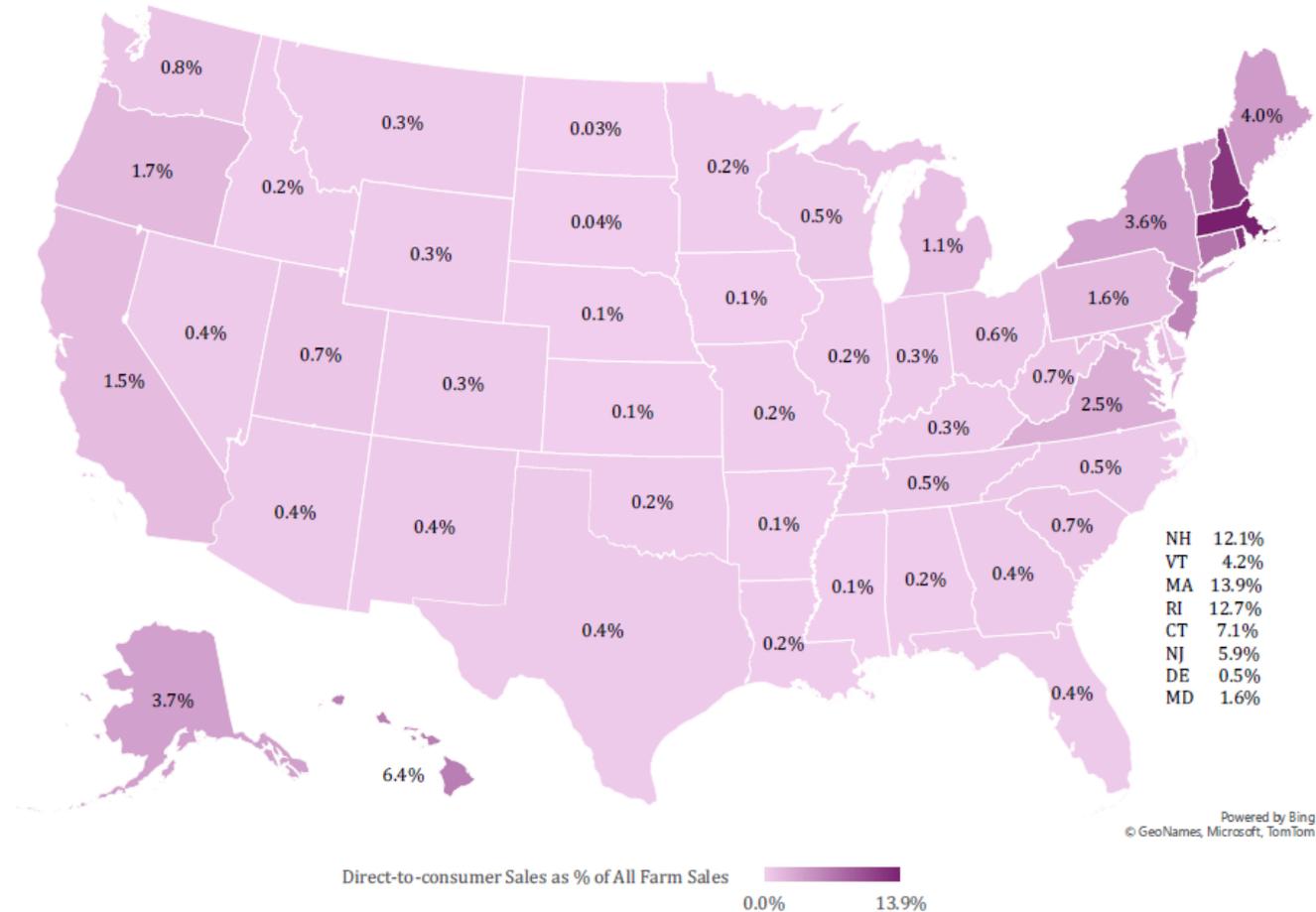
# Most farmers are not making money from farming

- In the U.S., small family farms represent:
  - 86% of all farms
  - 41% of the farmland
  - 17% of the total value of production
- Most U.S. farm households (regardless of size) do not rely on farming for a living
  - 85% received over half of their income from off-farm sources.
  - 51% had negative income from farming

# **Agritourism is especially important in New England**

# Direct-to-Consumer Sales

Value of Direct-to-Consumer Sales as a Proportion of All Sales on Farms, 2022



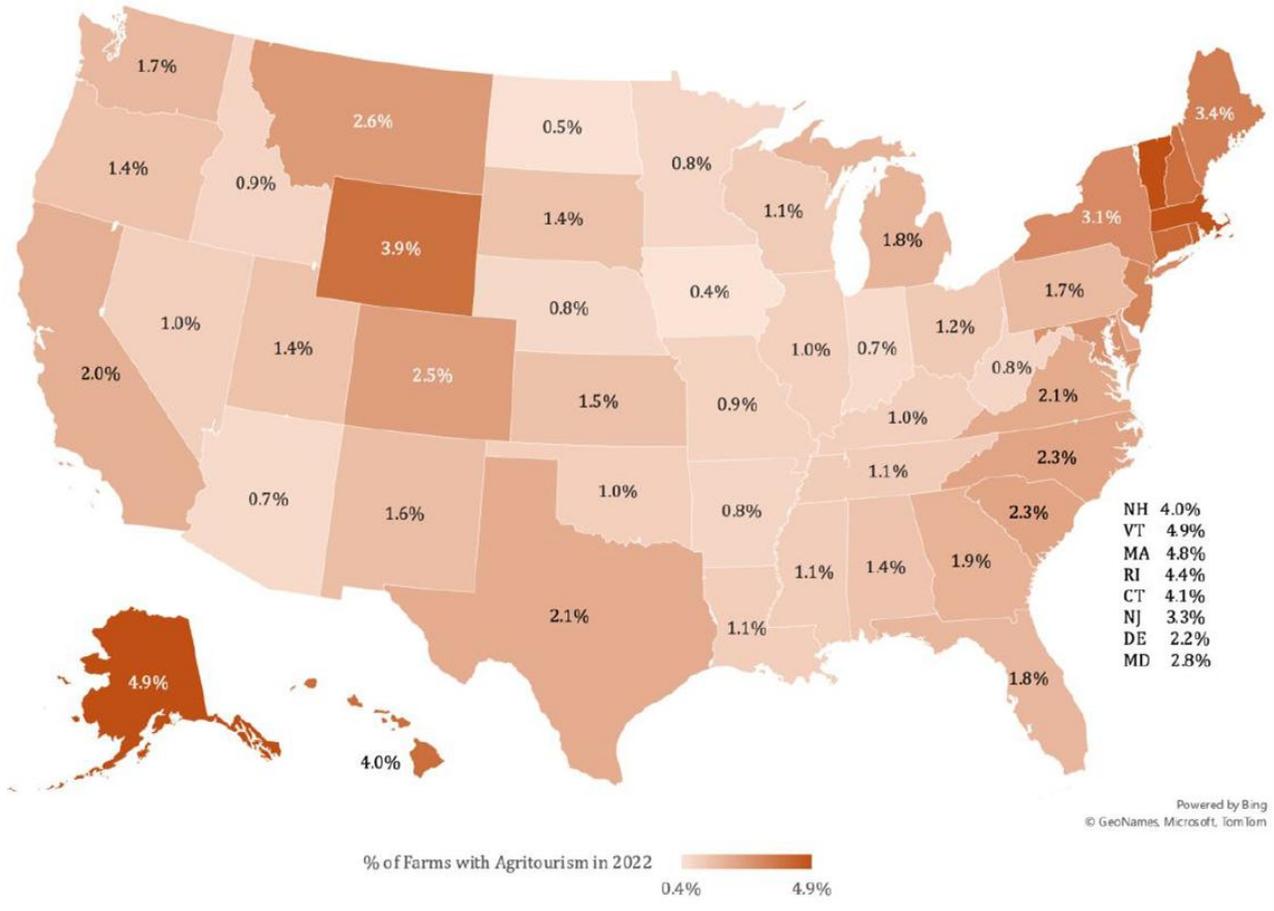
Powered by Bing  
© GeoNames, Microsoft, TomTom

Entsminger, Jason S., and Claudia Schmidt. 2024. "Direct-to-Consumer Sales of Agrifood Products by US Farms: Data from the 2022 Census of Agriculture." NERCRD Data Brief 2024-2.

<https://nercrd.psu.edu/pubs/direct-to-consumer-agrifood-sales-data-2022->

# Agritourism and Recreational Services

Proportion of All Farms with Agritourism or Recreational Services Receipts, 2022



Entsminger, Jason S., and Claudia Schmidt. 2024. "Agritourism and Recreational Services on US Farms: Data from the 2022 Census of Agriculture." NERCRD Data Brief 2024-1.

<https://nercrd.psu.edu/pubs/agritourism-data-2022-census-of-agriculture/>.

# Farm Viability



## The Carrot Project's Definition:

### The farm business covers its costs including:

- Fair **compensation** to the farm owner & workers,
- Covering **replacement costs** to maintain infrastructure & equipment;
- **Replenishing the soil** and ecological value on the farm (non-extractive farming)

### Next level viability:

- The farm is positioning itself for **future viability** and has the time and resources to do so
- The farm is continually adopting in **risk-management** approaches that protect viability

# Farm Viability



## Will the farm business cover all Household costs?

- Usually not. Farm viability does not mean a family member does not have an off-farm job for benefits or to contribute to household costs.

## Does it mean the farm has positive income every year?

- No. Farms experience extreme income variability.
- Viability includes having profits in the best years to put aside funds for years with negative income.

## What if the farm is not yet profitable?

- The farmer has goals, analysis, and a plan to get there, and has identified comfortable ways of meeting their household needs in the meantime.

# Farm Viability



**Farmers' Definitions of Viability are Changing Over Time:** Many farmers define farm viability as their “ability to stay in business and to keep the land in agriculture.”\*

**Why did that definition work for farm families in the past?**

- Historically, the driver of farm wealth was real estate appreciation, not annual profits. Staying in business often meant accumulating wealth in the long-term while an off-farm job provided income for today.

\*Bruce, A., Neidecker, E., Zheng, L. *et al.* “A farm is viable if it can keep its head above water”: Defining and measuring farm viability for small and mid-sized farms. *Agric Hum Values* 42, 625–641 (2025). <https://doi.org/10.1007/s10460-024-10687-9>

# Terms for Today's Discussion

**Asset** - The property or components of the property which have value.

**EXAMPLE:** BARN, HOUSE, WOODLOT, PARCELS

**Business Model** - The crops, products or activities, and the markets, customers, and revenue methods.

**EXAMPLES:** U-PICK STRAWBERRIES SOLD DIRECTLY TO FAMILIES; ORGANIC DAIRY SOLD TO A MILK COOP

**Resource Base** - The property assets and productive capacity to support the business model.

**EXAMPLES:** LOTS OF CONTIGUOUS PASTURE ADJACENT TO THE BARN; PRIME SOILS

# Terms for Today's Discussion



## Whole Farm Protection -

- The farm has adequate infrastructure, housing, and resource base.
- Context-dependent; not every farm parcel needs its own house.
- Does not necessarily mean the whole “farm parcel” (e.g., woodland) needs to be included in the restriction area.
- Good choices around whole farm protection are where we can enhance viability!

# How Does the Farmer Evaluate the Property?



## Key Criteria:

1. Resource base that will make the farm plan viable
2. Feasibility and cost to change assets
3. Water availability, are investigations needed?
4. Market access

## Property Business Risks to Examine:

1. Poor drainage (veg/crops), too little pasture (livestock)
2. Environmental concerns
3. Depleted soils & buildings
4. Too expensive for starting out, or overpaying
5. Farmland before market channels; is it a fit for where your business model is going?

# Issues in Practice: Overview

1. Resource base
2. Farmer selection
3. Housing
4. Infrastructure
5. Financing
6. Exits/transitions

# Issue: Viable Resource Base



*Farm Viability is affected by key farm resource base decisions at the time of conservation.*

- Should we conserve the whole property with all the components?
- How will this farm be used as a viable operation?

# Issue: Viable Resource Base



## Principles

1. **Bundle strategic viable farm assets**
2. **Exclude non-farm assets** with a high maintenance costs or taxes

## Examples

**Include:** A package of assets understood to fit a viable farm model; farmer & farm worker housing

**Exclude:** a large or costly to maintain single-family home; or non-farmable land with a high tax burden.

# Issue: Farmer Selection



## **Does the business chosen to farm the land:**

- Have the right business model for the resource base and local markets?
- Have the necessary financial skills and resources to mitigate risk (dollars for improvements or cash flow needs)?

# Issue: Housing



- When to include housing or not?
- Existing house or new housing right?
- Who can live there?
- How many units make a viable farm?
- Size restriction (gross sq ft, footprint, other?)
- Building envelope?
  - Was their due diligence on the building envelope? Will it perk?
  - Is the siting thoughtful to the farm needs?

# Issue: Infrastructure



- What does the operation require?
- Is existing infrastructure run-down or outdated?
- Was it properly evaluated (appraisals, inspections), and price adjusted accordingly?
- Should old infrastructure be removed or improved?
- Does a new farmer have the capital to improve or replace?
  - High construction cost, high interest rate environment!

# Issue: Financing



- Will the farmer be able to get financing in the future?
- Will the bank's loan conditions align with the conservation structure, including creative ownership (ground lease)?
  - Consider Implications for foreclosure
- Especially tricky to finance new housing right
- Plan ahead to remove roadblocks to farmer access to capital

# Issue: Farm Transitions or “Exits”



## Land Trust sale to farmer (BPS):

- Is the exit timed for the farmer’s financial readiness?
- Has property condition or appraisal changed?

## Farmer generational transitions:

- Has the farmer invested in infrastructure and a business model that another farmer wants to take over or buy?
- Graceful exits make graceful entries

# Working w/ Farm Viability Practitioners



- **Will the farm make it** after you conserve it and settle a farmer there?
- **Ongoing business support** de-risks projects, for both accessing land and for exits
- **Farmers and land trusts** may need support before, during, and after a transaction
- **Ask for review** of transaction structure, map/configuration, and easement terms
- Reach out to us at Carrot Project.

# Incorporating Farm Viability into CRs & private APRs



- Farm viability considerations in CRs vs. private APRs
- OPAVs - brief(!) explanation
- The house: include or not include?
- What farm infrastructure should be permitted?
- Agritourism

# Essex County: Urban, Suburban, Exurban



# What's Permissible in a Private APR vs. CR

	<b>CR</b>	<b>Private APR</b>
<i>Authorizing &amp; Approving Agency</i>	<i>EEA-Div. of Conservation Services</i>	<i>MDAR-APR Program</i>
Municipal Co-Holder?	Yes	Yes
Farmer's Primary Residence can be included	Maybe*	Yes
OPAV (Option to Purchase at Ag Value)	<b>No</b>	Yes
Farmworker Housing & other Permanent Farm Infrastructure	Yes*	Yes
<b>Potential Funding Sources</b>		
EEA-DCS LAND grant	Yes	<b>No</b>
EEA-DCS Conservation Partnership Grant	Yes	<b>No</b>
CPA Funding	Yes	Yes

**\* If LAND/Conservation Partnership is part of funding purchase, house must be excluded from CR. Building envelopes required for permanent infrastructure.**

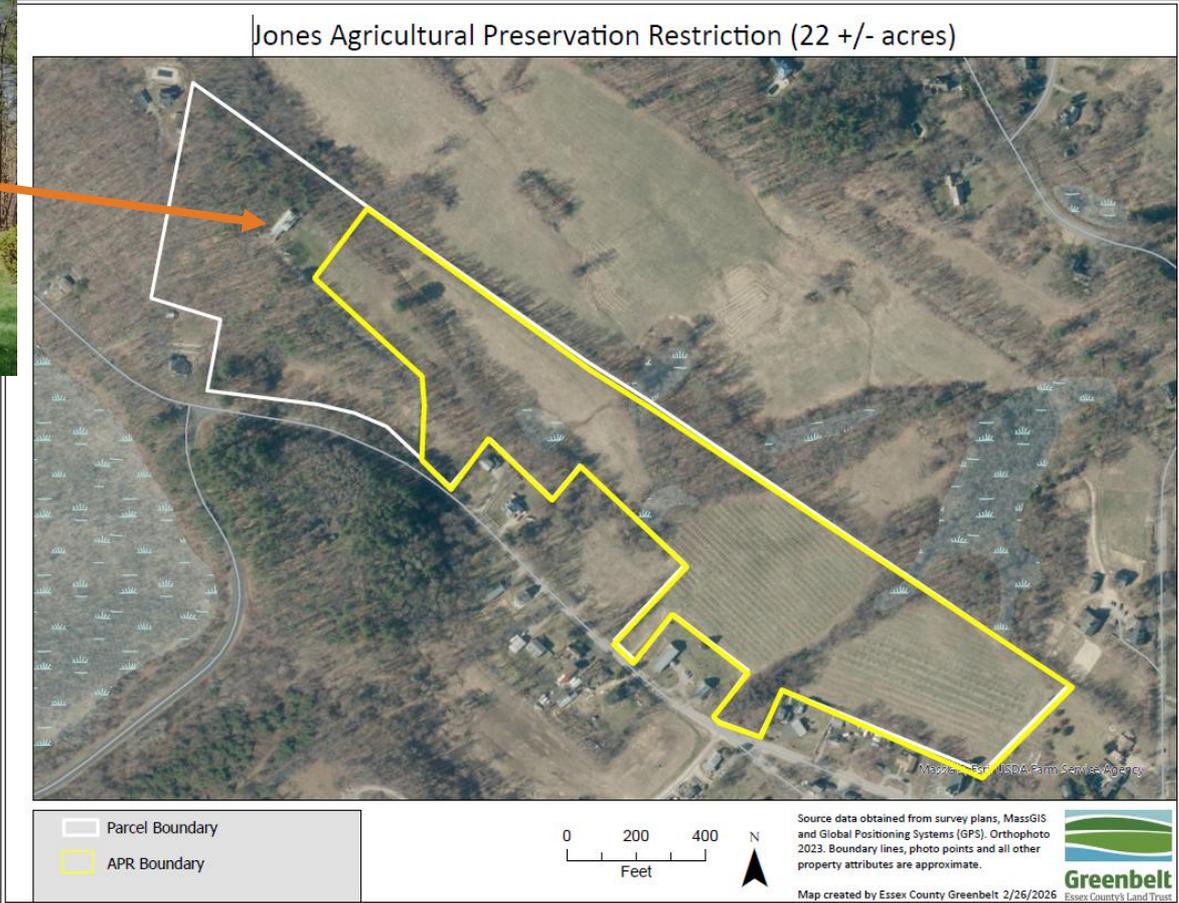
# Option to Purchase at Agricultural Value (OPAV)

- Gives holders of APR the option to purchase farm at its agricultural value if the farm will otherwise be sold to a non-farmer
- Buyer must be Qualified Farmer\*
- OPAV is embedded within APR
- OPAV = higher private APR value = reduced restricted fee value = greater land affordability for farmer-buyer

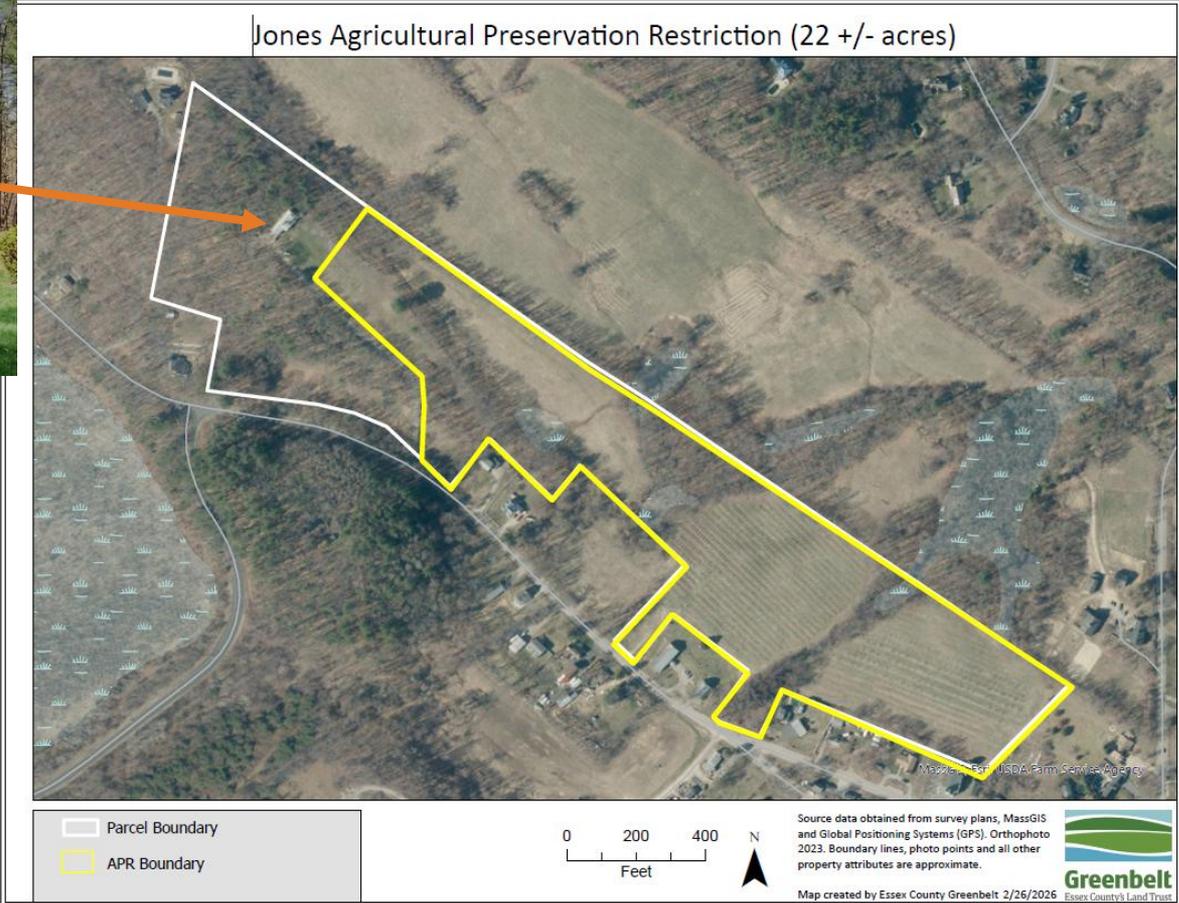


\*Qualified Farmer = makes at least 50% of income from farming and/or have business plan & experience to operate commercial farming operation.

# Jones Farm Private APR - Should Existing Home be Included?



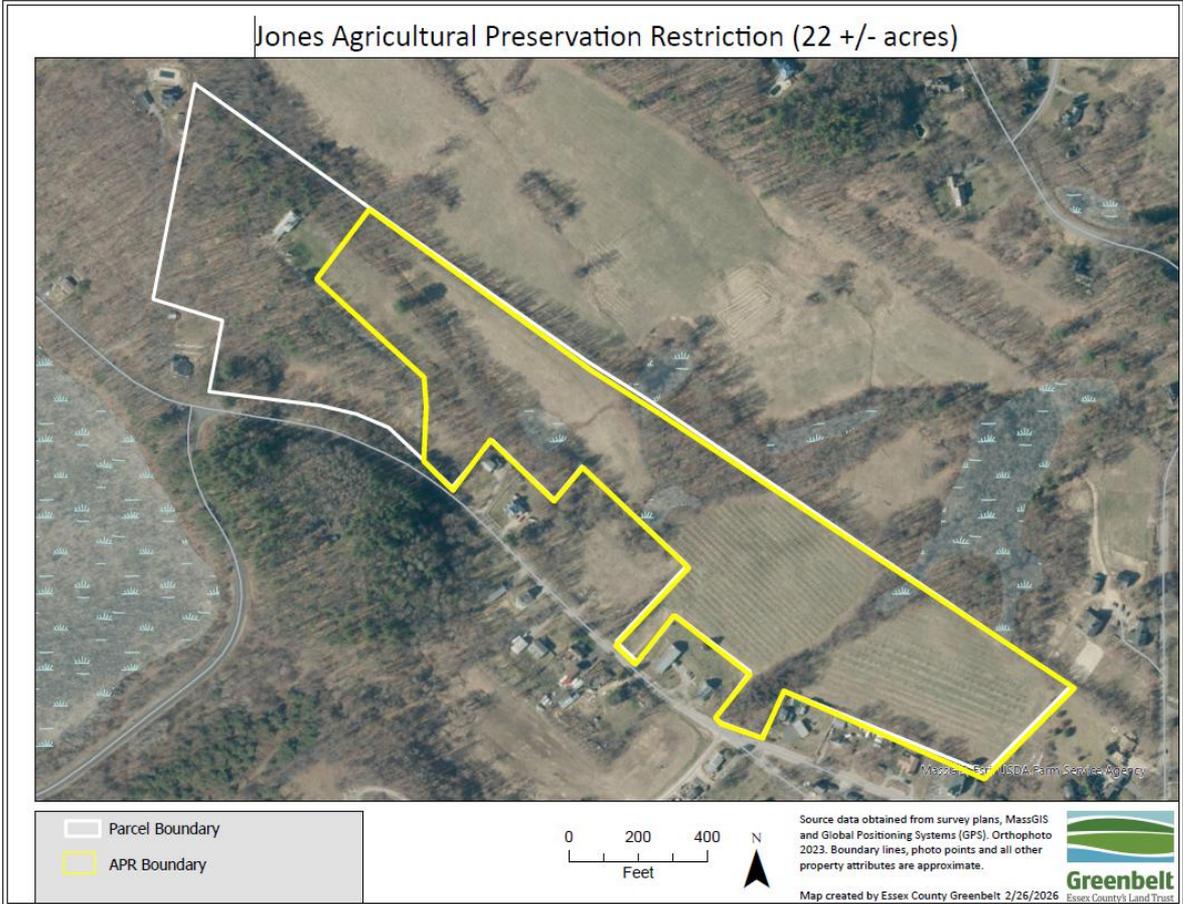
# Jones Farm Private APR - Should Existing Home be Included?



## Why Include House?

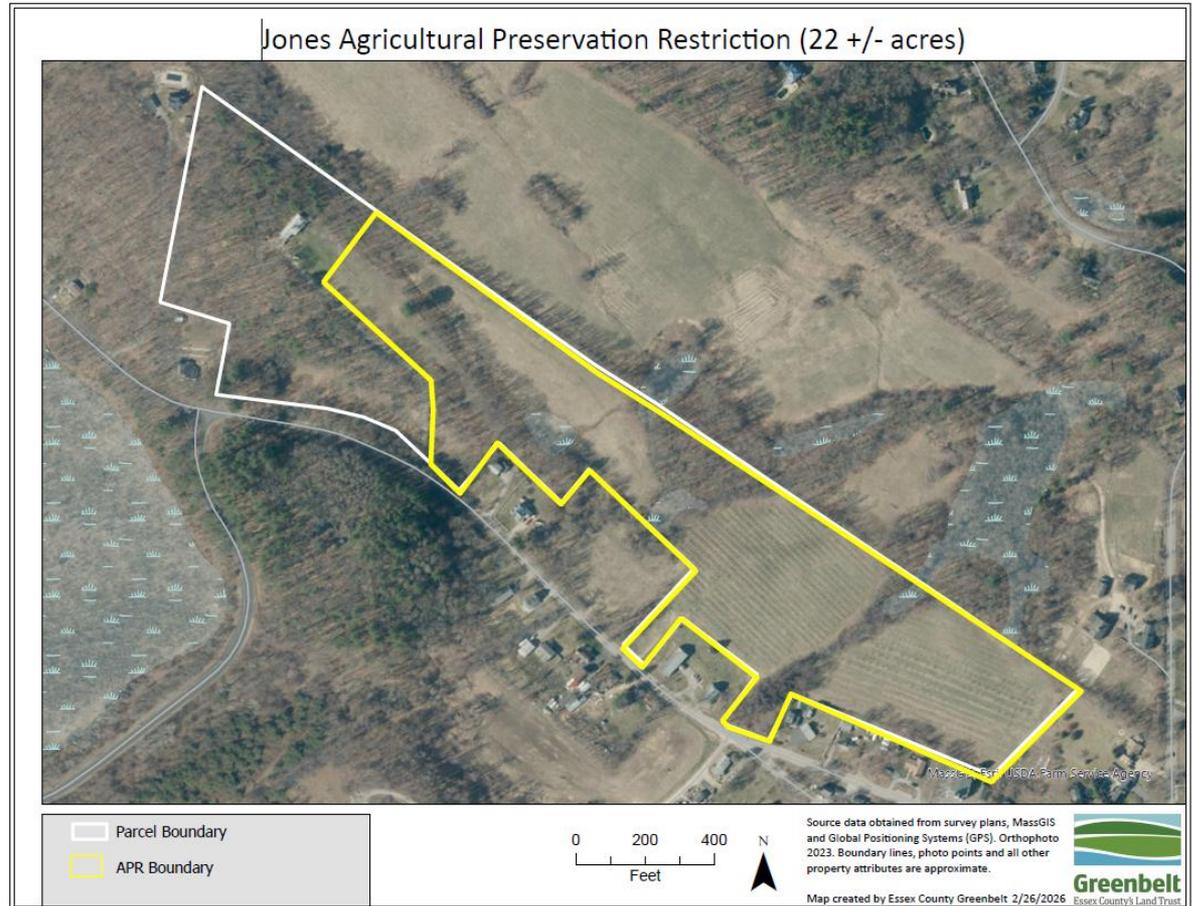
- Keeps house with farmland
- Private APR w/OPAV
  - Limits resale value to ag value
  - House must be sold to farmer

# What Farm Structures Should Private APR Anticipate?



# What Farm Structures Should CR/Private APR Anticipate?

- Barn(s)
- Equipment Storage
- Run-in shelters
- Farmworker housing
- Farm Stand
- Long-term crop storage
- Washing Station
- Customer Parking
- House for future farmer
- Other?



# Should there be limits on size / amount of infrastructure?

“Temporary” vs. Permanent Structures: should they be treated differently?

*“Temporary” = w/o a foundation that can be constructed / removed without significant soil disturbance.*



# Should there be limits on size / amount of infrastructure?

## *Examples:*

**Total footprint** of permanent structures no more than 2% total area of Private APR (approx. 20,000 square feet)

## **Prior approval** for:

- Barn and/or Farm Stand
- Combined footprint < **4,000ft<sup>2</sup>**
- No one structure > **2,500ft<sup>2</sup>**
- > 20% farm products sold must be grown/produced/raised on site
- Parking Area - impervious surface

**Temporary Structures** permitted w/o prior approval - not subject to 2% limit



# Agritourism - What Is It?



## Featured Farm Stays



Montana Bunkhouses W...  
Livingston, MT



Pocahontas County She...  
Renick, VA



Fat Sheep Farm and Ca...  
Hartland, VT

[See All Farms](#)

### Evergreen Farm classes in West Newbury

Summarized by AI from the post below

#### Newburyport Moms - Join

Kerri Marie · June 8, 2025 · 🌐

Hi everyone! Have you checked out Evergreen Farm on Ash St in West Newbury? It's beautiful! And the barn is gorgeous!

I am a certified personal trainer and group fitness instructor. I will be hosting some full body circuit classes and yoga classes in their barn this summer.

We hosted this first one this morning: Goat Yoga!

If you are interested in attending any of the events please email me and I'll just add you to the list and send out info about the events, I promise no spam!

@training4motherhood@gmail.com

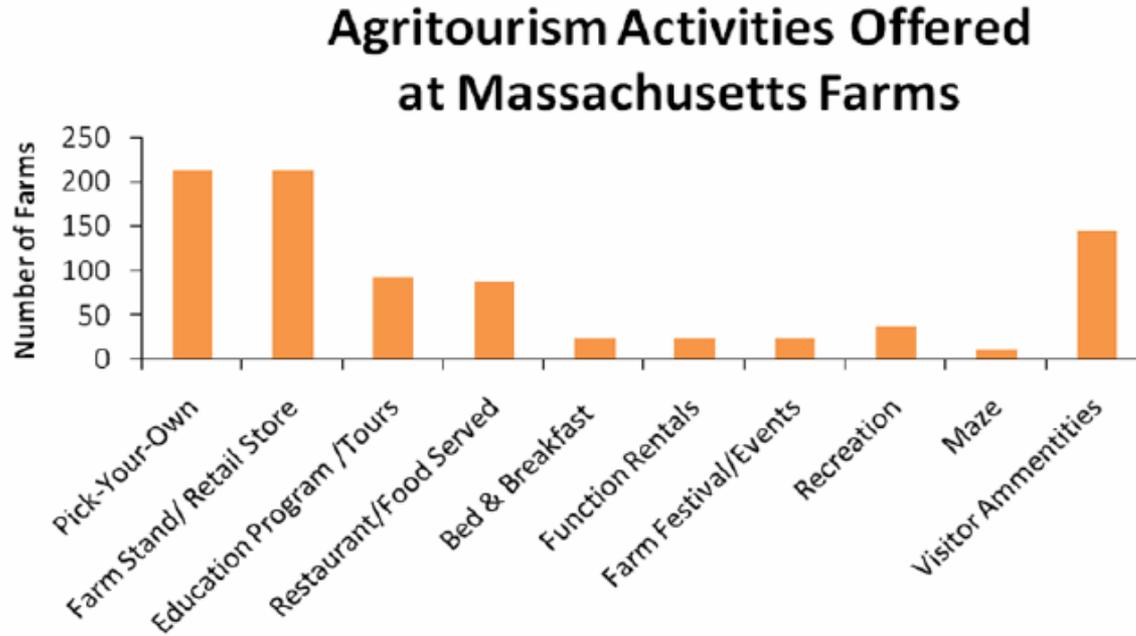
If you'd prefer, you can follow Training4motherhood or littleevergreenfarm on Instagram to get more info about upcoming events as well.

Thanks for supporting small and hope to meet you at a class this summer 🍋

## Over 50 YEARS OF Harvest Festivals!



# “Agritourism” Definitions Vary



Source: MA Dept of Ag Resources

7

# Case Study: Agritourism & Balancing Multiple Interests



# Case Study: Agritourism & Balancing Multiple Interests

## Farmer

- Rent space to school
- Classes of all kinds
- Large Events (Weddings)
- Parking for above + farm customers (CSA, PYO, Tree harvest)

## Municipality

- Rare Species
- Concerns about traffic & parking on public road



# Case Study: Agritourism & Balancing Multiple Interests

- CR Boundary adjusted to exclude areas of most intense use (school)
- Temporary parking area in CR
- Agritourism language limits based primarily on **avoiding adverse impacts**



# Case Study: Agritourism & Balancing Multiple Interests

## Agritourism Events and Activities

“ancillary commercial activities and events that support the financial viability of the use of the Premises for Agricultural Activities, which events and activities shall be limited to farm-based entertainment such as harvest festivals, hayrides, pony rides, farm-to-table meals, yoga, painting, farm-based education addressing such subjects as sustainable agriculture, food production, preservation and nutrition, and/or environmental conservation and ecology” provided:

- Agri-tourism events and activities shall be **incidental and subordinate to the primary use of the Premises for Agricultural Activities**
- **No more than five (5) Agri-tourism events or activities, at which Grantors anticipate more than fifty (50) attendee / year**
- **Allow temporary structures (tents, portapotties, etc.)**
- **No event parking in CR**
- **Explicitly excludes harvesting / purchasing of farm products from Agri-tourism**

## Other Events

“**With prior written approval** from the Grantees, use of the Premises for up to four (4) non-Agri-tourism events, such as weddings, per calendar year. Said approval shall not permit parking for guests, and shall consider impact of any proposed temporary structures, as well as the overall impact of the proposed activity on the Purposes and Conservation Values;”

# It's impossible to anticipate all possibilities future uses

Solution: The “Catch-All Paragraph” in Permitted Acts & Uses

*Other Activities. Such other non-prohibited activities or uses of the Premises may be permitted with the prior approval of the Grantee provided that the Grantee has made a finding, such finding to be documented in writing and kept on file at the office of the Grantee, that such activities are consistent with the Permitted Acts and Uses or, as applicable, are included in an approved Farm Plan, and do not materially impair the conservation values and purposes of this Agricultural Preservation Restriction.*

# Takeaways and Resources

## Takeaways

- Land trusts don't have to be the expert - call on a farm business advisor

## Resources for land trusts and farmers

- The Carrot Project

# Please get in touch!



Kathleen Doherty

[kdoherty@farmland.org](mailto:kdoherty@farmland.org)

American Farmland Trust



Benneth Phelps

[bphelps@thecarrotproject.org](mailto:bphelps@thecarrotproject.org)

The Carrot Project



Vanessa Johnson-Hall

[vkjohnson@ecga.org](mailto:vkjohnson@ecga.org)

Essex County Greenbelt Association

