



Models and Guidelines for Farm Succession and Transfer Planning

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Key Points

- Coaching
- The “soft issues”
- Team approach
- “Ongoing-ness”
- Junior generation
- Funding
- Land Access Project (2)

Coaching

- What farm families need and why
- The coaching function
 - Not counseling
 - Not subject expert (although could also be)
 - Support & structure
 - Coordination
 - Guidance
- Skills needed

The “soft issues”

- Must be attended to
- Vision, values and goals
- Communications
 - Styles (yours, theirs)
 - Barriers
 - Exercises
- Conflict management
- Building relationships

Team Approach

- Who is the driver?
- How are communications handled?
- How is confidentiality addressed?
- Finding advisors... FTNNE
- Know your role(s)



“Ongoing-ness”

- Planning process takes time
- Families need continuous motivation
 - Benchmarks
 - Deadlines
 - Check-ins
- Succession School example
 - 3 sessions over 32 months
 - Assignments → product



Junior Generation

- Often junior generation on the farm is the driver
- Option is not to be on the family farm
- Who is the client???
- See LFG's guide
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Funding: challenges

- Client pays for services
 - LFG sliding scale and cost-share
- Third party pays or contributes
 - MDAR, VHCB, Dairy Promotion Board
 - Private foundation → LFG's Opportunity Fund
 - Contract from other organization
- Grant-funded
- Other: USDA? Commodity orgs?



Land Access Project

- Funded by USDA Beginning Farmer and Rancher Development Program
 - Includes farm transfer as statutory interest
 - *Very few projects address succession*
- Succession & Transfer Assistance TF
 - Succession School
 - FTNNE
 - This CLE training and desk reference



Learnings

- Don't promise what you can't deliver.
- Know your skills and limitations.
- Don't get attached to an outcome.
- Recruit and rely on your team.
- "Soft" support matters (the most?).
- Not all farm transfers are successful.





Thank you.

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