

10-28-2021

Insights Into Barriers and Educational Needs for Farm Succession Programming

Heather Schlessler

University of Wisconsin-Madison Division of Extension, heather.schlessler@wisc.edu

Sandra Stuttgen

University of Wisconsin-Madison Division of Extension, sandra.stuttgen@wisc.edu

Liz Binversie

University of Wisconsin Extended Campus, liz.binversie@uwex.edu

Joy Kirkpatrick

University of Wisconsin Madison Division of Extension and the Center for Dairy Profitability, joy.kirkpatrick@wisc.edu



This work is licensed under a [Creative Commons Attribution-Noncommercial-Share Alike 4.0 License](https://creativecommons.org/licenses/by-nc-sa/4.0/).

Recommended Citation

Schlessler, H., Stuttgen, S., Binversie, L., & Kirkpatrick, J. (2021). Insights Into Barriers and Educational Needs for Farm Succession Programming. *The Journal of Extension*, 59(4), Article 4. <https://doi.org/10.34068/joe.59.04.04>

This Feature Article is brought to you for free and open access by the Conferences at TigerPrints. It has been accepted for inclusion in The Journal of Extension by an authorized editor of TigerPrints. For more information, please contact kokeefe@clermson.edu.

Insights Into Barriers and Educational Needs for Farm Succession Programming

Cover Page Footnote

We would like to thank the following University of Wisconsin Division of Extension Agriculture Educators for participating in the facilitation of the focus group meetings: Richard Halopka, Melissa Kono, Bill Halfman, George Koepp, and Sarah Mills-Lloyd. We would like to thank Frank Frier and Michael Lochner of the Wisconsin Department of Agriculture, Trade and Consumer Protection Farm Center, and Rebecca Binsfield of Compeer Financial for their participation in the focus group meetings. We want to thank Trisha Wagner, FARM Team Program Manager; Samuel Pratsch, Evaluation Specialist; and Kyrie Caldwell, Assistant Researcher, for their assistance in evaluating the focus group meeting transcripts.

Insights into Barriers and Educational Needs for Farm Succession Programming

HEATHER SCHLESSER¹, SANDRA STUTTGEN¹, LIZ BINVERSIE², AND JOY KIRKPATRICK³

AUTHORS: ¹University of Wisconsin-Madison Division of Extension. ²University of Wisconsin Extended Campus. ³University of Wisconsin-Madison Division of Extension and the Center for Dairy Profitability.

Abstract. Planning for farm succession is vital to the longevity of the farm business. To understand the challenges with succession planning, the University of Wisconsin - Division of Extension facilitated focus group meetings across the state. These authors classified the information from the focus groups into eight codes, and each code was further subdivided into themes. The codes included Financial, Communication, Control, Change, Fair vs. Equal, Delivery, and Support, Strategies, and Educational Needs. University of Wisconsin Division of Extension Agriculture Educators utilized the information obtained from the focus groups to create a workbook that provides practical assistance when working with families planning a farm succession.

FARM SUCCESSION PLANNING

The family farm is a symbol of Wisconsin's Dairyland, with 96% of farms utilizing a family-based agriculture enterprise structure (United States Department of Agriculture, 2019). With the average age of the owner generation increasing from 54.5 in 2012 to 56 in 2017 (United States Department of Agriculture, 2019), the farms' transition to the ownership of the younger generation is vital to the farms' overall success. However, we know that only 20% of farmers complete a farm succession plan (Pitts et al., 2009). Furthermore, it is typical for the owner generation not to identify a successor or communicate their plans to the future successor. Only 51% of the farms studied by Giraud and Baker (2005) had identified a successor.

According to Pitts et al. (2009), dialectical tensions are why farm operators fail to communicate about or create a succession plan. While these dialectical tensions exist in farm families in Pennsylvania, it is unknown if they exist in farm families in other states. Researchers in Minnesota (Hachfeld et al., 2009) identified five barriers to developing and implementing succession plans. These included a lack of time, inability to set goals, lack of consensus among family members, difficulty finding vetted professionals, and parents not ready to give up control. To gain further insight, we conducted focus group research to identify reasons Wisconsin farmers do not complete farm succession plans and the educational needs surrounding farm succession.

MATERIALS AND METHODS

The University of Wisconsin Division of Extension Agriculture Educators facilitated four focus group sessions across the state with 28 total participants. This manuscript's authors constitute a subgroup of county educators and state specialists involved in this project. To facilitate conversations, county educators invited either the farm's successor or owner generation to participate in a focus group. Sixteen participants represented the owner generation, and 12 represented the successor generation. Three locations had a mix of individuals that represented both the successor and owner generations. The fourth location consisted of only the successor generation.

Facilitators maintained consistency in the information obtained by using standardized questions aimed at answering specific research objectives:

- What are the barriers to farm succession planning?
- What program logistics would be beneficial in helping farms through the farm succession planning process?
- What educational needs are there regarding farm succession?

Focus groups were structured to maintain confidentiality and create a safe and open environment for participants to share their experiences. Facilitators recorded each session using letters to identify participant comments rather than their names.

Transcripts were transcribed and coded into themes that identified patterns in the transcript. Themes were based on existing research findings and modified to represent the patterns of our current understanding of farm succession and its pressures. This process broadly aligns with thematic analysis (Braun & Clarke, 2006), a widely used analytic strategy in qualitative evaluation and research. According to Braun and Clarke (2006, p.87), “A theme captures something important about the data in relation to the research question and represents some level of patterned response or meaning within the data set.”

The codes used to identify tensions included: *Financial, Communication, Control, Change, and Fair vs. Equal*. We developed additional codes to categorize comments regarding how facilitators can support farmers through the farm succession process. These additional codes were *Delivery and Support, Strategies, and Educational Needs*. Throughout the analysis, we used the Qualitative Data Analysis Software MAXQDA to iterate and document code definitions and retrieve and review coded data segments.

While programs like MAXQDA do not execute analytic operations, they provide a stable work environment for analytic work when performed by collaborative teams. To ensure that the use of the software was truly in service of our analytic approach (Woolf & Silver, 2018), we consulted and worked with Methods and Qualitative Data Analysis Software specialists at the University of Wisconsin Division of Extension. These specialists facilitated the construction of software-based workflows based on the Data Jam Curriculum (Schmieder et al., 2018).

RESULTS

The information from the focus group meetings is summarized below by code and theme within each code. Codes are presented in their order of perceived importance, based on the number of comments classified for the code. Table 1 summarizes the number of comments for each code from the four focus group locations and the major and minor themes within each code. The major themes were identified as those themes that were discussed at three or more of the focus group sessions. Major themes are elaborated upon in this section.

TENSION CODES

Financial Code

Twenty-five comments from 14 participants were assigned to the theme *profitability*. Comments in this theme referred to the need for the business to be profitable for the next generation.

“Farm succession is keeping the business profitable for the next generation and taking care of the prior

generation, so they live a life that they deserve for as hard as they worked over the last course of their career.” —Abbotsford, A

Thirty comments from eight participants were assigned to the theme *needs from the farm*. Comments in this theme referred to identifying the older generation’s needs in retirement and what the younger generation can afford to pay them.

“My parents are not even close to retiring yet. We both need to make a living off the farm yet.” —Oconto, C

Twelve of the comments from seven participants were assigned to the theme *debt*. Comments referred to the owner generation’s difficulty signing loan papers that place them in debt for the successor generation.

“We just . . . put in two robots. We were in our 50’s. The kids said, ‘either you change something, or we’re going to go’ because we’ve been in the barn since 1947 —a stall barn. But then I thought, ‘do we take on this big debt? Do we do this? They are the age where I don’t think they really know what they’re doing yet. What if they leave, then what are we going to do with this?’” —Abbotsford, G

Eleven comments from eight participants were assigned to the theme *financial barriers for beginning farmers/successors*. Comments in this theme referred to how hard it is for beginning farmers/successors to get a loan due to the high land prices.

“The complexity that you have to overcome is getting so vast that it’s a little staggering. When my brothers and I were transferred into the farm, it was a long time ago, and it doesn’t work that way anymore. Now that you have more families involved, it doesn’t take a very big farm to be too big for one person to ever afford on their own. I don’t ever see our son having the money to take over our entire farm. How is he ever going to do that?” —Portage, B

Communication Code

Twenty-eight comments from eight participants were assigned to the theme *transparency*. Comments in this theme referred to the need to be open about the farm transition process and the farm income and expenses.

“If you have a family, you have to sit down, and you have to communicate. It’s the only way it’s going to work. You have to communicate. You have to tell them ‘this is the way it is. I’m sorry I hurt your feelings. But if it’s not this way, it’s not going to work.’ That’s what it comes down to. These farms

Barriers to Farm Succession Programming

Table 1. Summary of the Number of Comments and Participants for Each Code, and Themes Identified

Code	Participant Number (N=28)	Number of Comments identified	Major themes identified at three or more locations	Minor themes identified at fewer than three locations
Financial	20	125	profitability, needs from the farm, debt, financial barriers for beginning farmers/successors	concerns about farm size, literacy, risk, transparency, taxes, land values, cost of professional services
Communication	21	92	transparency, starting the conversation, family dynamics, generational divides	conversation involving death, guilt
Control	22	67	fear of losing homestead, incrementally letting go, older generation does not want to plan for the future	don't meddle, control through financial management, leap of faith, younger generation needs to prove themselves, being ready to share
Change	17	52	defining change, hating to change, change work ethic, ability to express feelings, wants, and wishes for change	inability to consider other options
Fair vs. Equal	15	51	business risk, sibling harmony, emotions, personal risk	treating assets as strictly inheritance and not business
Delivery and Support	23	129	delivery of information, facilitation, marketing, peer groups, lawyers	support
Strategies	23	113	communication, timeline, professionals, tools, modernize, do nothing	relinquishing control, trust, start early, insurance, balancing debt, profitability, going off the farm, gifting, sweat equity, peer—to —peer
Educational Needs	19	75	workbook/worksheets/workshops, vetted professionals list, peer learning	estate planning topics, taxes, communication of feelings, education for professionals

cannot handle, these businesses cannot handle splitting them in half, taking a quarter out, paying people off. The margins are too tight to begin with.”
—Abbotsford, A

Twenty-three comments from 11 participants were assigned to the theme *starting the conversation*. Comments in this theme referred to the need for a conversation about the farm succession process and a third party to help “break the ice” and keep the conversation going.

“I think there is a lot of fear. It’s a difficult discussion because you have to talk about your mortality, and you have to talk about the fact of how you can be fair to all your children. That’s the biggest thing. Some just think, ‘I can wait; they can take care of it when I’m dead, and I don’t have to worry about it.’” —Melrose, H

“A [facilitator] to get them to the table. Just put it out there. It’s not a secret and shouldn’t be a secret.”
—Portage, D

Twenty-one comments from 13 participants were assigned to the theme *family dynamics*. Participants’ comments reflected a lack of trust in in-laws and an unwillingness or lack of knowledge about bringing in-laws into the conversation.

“I would agree with the spousal thing with your children. You don’t know them as well as you know your children. There is that fear. You worked really hard to get the farm where it is, and you want it to stay together, and you want to protect that without being hurtful, without the spouse of your children thinking we don’t trust you.” —Melrose, H

Twelve comments from eight participants were assigned to the theme *generational divides*. Participants’ comments reflected the owner generations’ feelings that the successor generation was not ready or did not have the ability to take over the farm.

“Are the kids ready? Are they responsible to take [the farm] over? It seems as though every generation

that we get is less and less [willing to work]. I don't mean to bash the generations, but it's, 'how can we get more for less?'" —Abbotsford, B

Control Code

Twenty comments from 13 participants were assigned to the theme *fear of losing the homestead*. Participants feared losing the homestead due to the younger generation's divorce or because the younger generation decided to sell the land.

"The other fear with children is their spouses. Even if the children get along, the laws in Wisconsin make it too easy for a spouse that doesn't want to stay in the marriage to take too much equity with them." —Melrose, A

"You don't want to transfer the farm and then they turn around and sell it and take the cash and go to Vegas." —Melrose, G

Thirteen comments from 10 participants were assigned to the theme *incrementally letting go*. Participant's comments reflected that the younger generation had a greater chance of success if control of farm operations was incrementally passed to them. Individuals indicated that the younger generation needed to be given control over small decisions before they could make more significant decisions.

"My wife and I are already talking that in 15 years, we're going to start stepping aside. I know that when I'm 55 years old, I'm done. I feel that for the next generation to be successful, you have to empower them. My dad, from the start, let me make decisions when I was 23 or 24 years old. They weren't huge decisions, but they were little decisions, and you just kept building off of them." —Abbotsford, A

Twelve comments from nine participants were assigned to the theme *older generation does not want to plan for the future*. Comments in this theme related to the fact that the older generation fears not being needed anymore, so they don't relinquish control. There were also comments regarding the fact that the family patriarch or matriarch has all the control, and there will be no succession planning while they are alive. This theme's comments also reflected the owner generation's feeling of not having to share control since they own the farm.

"That age group that you're talking about, that's how it is. It's the male-dominant of 'we're going to do it this way and my way, and that's how it is.'" —Portage, C

"She just would not leave. She had a stroke when she bent down to milk the cow with a bucket. She said, 'I

have to be here; who is going to do this? You're not going to be able to do this right.'" —Abbotsford, G

Change Code

Sixteen comments from eight participants were assigned to the theme *defining change*. Comments in this theme referred to identifying what change meant in each farm succession instance. Change could mean modernization or the older generation taking more vacation days.

"Whether you expand or not doesn't matter, but it's keeping that [forward] progress that was started by the previous generation. The fact that we milk 120 cows blows their mind because they had 45, and they thought they could always make a living off of 45 cows." —Oconto, B

Thirteen comments from eight participants were assigned to the theme *hating to change*, referring to the fact that humans do not like to change. For the older generation, changing what they are doing is admitting they are not going to live forever.

"I think of my mom's situation. My dad has passed. They rented the farm out since '94. I think it is hard for her to sell anything because she and my dad created it. Now she's in her 80s, and she's thinking about it, but then there's that sentimentality of that's where we grew up." —Melrose H

Eleven comments from seven participants were assigned to the theme *change work ethic*. Comments referred to the older generation's expectation that the younger generation needs to change their lifestyle to be more like them and work the same way the older generation did.

"It seems to be going back to lack of discipline or work ethic. I think that can go back to why there isn't succession. It's hard work. It doesn't seem like this younger generation likes a lot of hard work. I'm sorry but . . ." —Abbotsford, B

Eight comments from five participants were assigned to the theme *ability to express feelings, wants, and wishes for the change*. Comments referred to the older generation's inability to say what they want from the farm succession or their unwillingness to discuss the process and how this contradicts the younger generation's need to talk about the farm succession process.

"I always wanted the touchy-feely stuff. I'm the in-law side of the farm transition. I want people to be touchy-feely about it. What do you want your role to be when we transition this farm? ... It's hard to pin them down and say, 'what do you really want to

Barriers to Farm Succession Programming

do?’ when they can’t envision what it’s going to look like.” —Abbotsford, D

Fair vs. Equal Code

Nineteen comments from eight participants were assigned to the theme *business risk*. Comments suggested that the successor generation needs to know how the parents have decided to divide the farm so they can prepare before the parent’s death. Comments also indicated that equal division of farm assets to off-farm siblings puts the farm business at risk, making it important to separate business finances from personal finances.

“Both my father-in-law and father hold the cards. They are from the old school in that ‘it’s in my will and you’re going to find out [what’s in it] when I’m gone.’ So we’re at a halt; we can’t move at all. How can we move forward? How can we buy-in? To prepare tax-wise—I don’t know how to do it because we don’t know what we’re going to get.” —Portage, D

Thirteen comments from 11 participants were assigned to the theme *sibling harmony*. Comments illustrated that different siblings have different motives regarding farm succession.

“Passing the farm on in a way that it stays financially viable but yet the family [members] not involved in the farm still gets along with the rest of the family that is on the farm.” —Melrose, D

Eight comments from six participants were assigned to the theme *emotions*. Comments in this theme illustrated the emotional attachment the family has to the land. Owner generations also shared concern about family relationships if the assets are not divided equally.

“I understand why he wants to hold onto [the land], but my fear is that by holding onto it so tightly, the rest of us are going to lose in the end. That’s the problem. He’s like, ‘I finally own it, and why do I have to share?’ He’s not going to let go of it so easily, and I get it.” —Portage, A

“When I think of defining farm succession, another thing that hasn’t been mentioned as much is the homestead, the original. A lot of people had their original grandparents or great-grandparents or great-great-grandparents come over, and there is so much [history].” —Abbotsford, B

Seven comments from five participants were assigned to the theme *personal risk*. Comments in this theme referred to the risk the on-farm heir has chosen by staying on the farm.

Comments also referred to the uncertainty that the heir’s sweat equity would be considered when assets were divided.

“A lot of the articles that I’ve read about treating the youngster fair... if one stays and helps you a lot and the others leave town and go somewhere else and don’t help at all, the one helping you should get the best deal, and that should be fair.” —Melrose, F

ADDITIONAL CODES

Delivery and Support

Fifty comments from 16 participants were assigned to the theme *delivery of information*. Participants repeatedly identified the desire for face-to-face meetings, because not everyone is available at the same time. Participants also identified that having refreshments or a meal offered would be an incentive for attendance. The registration fee for the meeting should be minimal to encourage more than one person from each farm to attend, and participants suggested a price of \$10–\$15. The younger generation was also interested in recorded webinars for future viewing.

“Give it to us in small chunks so we can get it and do it and move to the next step instead of so much stuff at one time. These are great classes that you put on, but it’s too much all at once. We have a lot of decisions to make when we leave here.” —Portage, D

Thirty comments from eleven participants were assigned to the theme *facilitation*. Participants stated there was a need for facilitated meetings to keep the farm family on track during the succession process. Meetings should remain focused, include an agenda, and last no longer than 2–2.5 hours.

“I think the most important thing is having a person there to help you have these conversations and to help keep the conversations neutral. For me, that’s what I find to be most important. There is no one size fits all.” —Oconto, D

Twenty comments from nine participants were assigned to the theme *marketing*. Comments reflected the need for Extension and other educators to use multiple program advertising methods including social media, email, and direct postcard mailings. Participants said that agriculture service providers could be utilized to promote Extension succession programming.

“In the end, it might be the wording that you use. It might be more [meaningful] ... to say, ‘do you want your neighbor to have your farm, or do you want your family to have your farm? Come to the meeting!’” —Melrose, H

Fourteen comments from 13 participants were assigned to the theme *peer groups*. Comments in this theme reflected their preferred method was learning from other farmers and having a mentoring program for those going through the farm succession process. Participants specifically suggested a daughter-in-law peer group.

“Farmer-to-farmer networking is still your best. Peer-to-peer networking whether it’s for the incoming generation or the outgoing generation is key.” —Abbotsford, E

Eleven comments from six participants were assigned to the theme *lawyers*. Comments reflected the need to have a good lawyer who knows the right questions to ask and with whom all parties are comfortable and can trust.

“If you have a good attorney that knows what they’re doing, they are going to walk you through the process, and they are going to give you time to think about things. You’ll have a half dozen meetings with them at least.” —Abbotsford, B

Strategies Code

Fifteen comments from eight participants were assigned to the theme *communication*. Comments referred to the fact that all generations need to hear the same information simultaneously.

“I thought that it was key that when we went to one workshop, it was myself and my mother-in-law. So you had both generations sitting in the same room. It’s not like we went home and all of a sudden got our lawyer in place and got this in place and that in place, but it did start the conversation.” —Abbotsford, D

Fifteen comments from six participants were assigned to the theme *timeline*. Comments referred to the fact that farms needed a timeline for transferring assets and management.

“What I’ll do first is have a meeting with my husband and have a proposal on what we want to accomplish and a timeframe and give it to my parents, so they know what we’re thinking and is this doable or is it not; do we agree with this; what would they change and go from there. Then we would meet with the tax accountant and an attorney and all that. It’s having a plan that you want to happen, so the older generation knows exactly what you want.” —Oconto, C

Eleven comments from eight participants were assigned to the theme *professionals*. Comments referred to the need to find professionals you can trust that are knowledgeable in agriculture.

“I think you need to have the accounting, the tax stuff, and the legal, and you need to have someone in those positions that has your best interest. That may mean separating from the people that your parents currently work with.” —Oconto, B

Twelve comments from nine participants were assigned to the theme *tools*. Comments referred to the fact that participants wanted to have templates and information about trusts, lease agreements, business entities, and land contracts.

“I wish there was an outline where you don’t have to go to a lawyer or a series of lawyers to find out these options. We have a lot of things to do on the farm rather than checking out the laws that are changing for property transfers. I guess if there was some kind of pamphlet that outlined the trusts or will or marital property.” —Melrose, E

Eight comments from eight participants were assigned to the theme *modernize*. Comments referred to the need to modernize and stay current with technology to keep the next generation’s interest.

“Being the next generation, a big thing for succession for me is technology. I know the older generation is not a fan of technology. Even I’m not a fan of technology; you have to stay on top of the technology. If you don’t stay on top of the technology, you’re not going to succeed as well as everybody else who does stay on top of the technology. You have to get out of the old tie stanchion barn and get into a robot barn or parlor.” —Abbotsford, H

Ten comments from 10 participants were assigned to the theme *do nothing*. Comments referred to the fact that some farms do not plan for farm succession.

“I have family ties where the father is at his end. It’s not transitioned, and there are four kids, and one is on the farm. It’s a sad thing to watch. I’ve pointed him in the direction of the [Wisconsin Department of Agriculture, Trade and Consumer Protection] Farm Center because that is a place they can seek help on transitioning and doing some of that, but they won’t do it, so it’s a ticking time bomb.” —Abbotsford, B

Educational Needs

Twenty-eight comments from 12 participants were assigned to the theme *workbook/worksheet/workshops*. Comments reflected the need for a workbook, worksheets, and workshops. Topics for workshops/worksheets included:

Barriers to Farm Succession Programming

- Awareness of University resources
- Tools to assess how prepared the younger generation is to take over management decisions
- Operating agreements
- Business entities
- Tax laws/terminology

“If you had a half-day workshop where you brought your counties together and had a meeting just like you do for [feeding] beef and talked about [farm succession]. I think you go to something it gets in your head and then you might act upon it a little quicker.” —Melrose, A.

Twenty-four comments from 12 participants were assigned to the theme *vetted professionals list*. Comments referred to the need for a vetted agriculture professionals list to enable farmers to be good consumers of professional services.

“I don’t trust too many lawyers. We had one approach us on our farm. He wanted to set up trusts for us. My wife, who happens to be a daughter of an attorney from California (an agriculture attorney), said to me after we talked to this guy, ‘I don’t trust this guy’. How do we know who we can trust to do this for us?” —Portage, B

“If there is a lawyer that is really good in this, it’s not shared that often as to which lawyer to see or if an agency like UW Extension for Agriculture knows someone or if they can get a list of lawyers that are very good at passing that, that would be a good resource for a lot of us —or a county agent or something. It would be nice to have that resource available if we could find a way to do that.” —Melrose, B.

Seven comments from seven participants were assigned to the theme *peer learning*. This theme described how farmers wanted to learn from others that had completed or were currently going through a farm succession.

“Maybe another thing is to do a mentoring thing where you can say so-and-so did what you are looking to do and match that way too. You could have someone to sound some stuff off of. They’ve already had those conversations. They’ve already done some of that stuff, so they can say, ‘don’t do this or do this.’ That might be a peer group or a mentoring type of thing.” —Oconto, B

DISCUSSION AND CONCLUSION

As Wisconsin farmers’ average age continues to increase and fewer successors are identified, it becomes crucial to identify ways to increase farm succession planning. By dissecting the focus group transcripts, we better understand the needs of the individuals involved with farm succession. The findings of these focus group meetings reaffirm common tensions and barriers (Hachfeld et al., 2009; Pitts et al., 2009) as to why farm succession stalls or is never planned.

Our focus group research affirms that the five tensions identified by Pitts et al. (2009) exist on Wisconsin farms. Further, our findings indicate agreement with four of the five barriers identified by Hachfeld et al. (2009). We also determined the educational needs of participants going through a farm succession and have highlighted a need to design a Wisconsin-specific farm succession workbook that improves farm family communication skills. This workbook should contain a series of worksheets intended to be completed by both the owner and the successor generations with the aid of a trained facilitator. The intent of the University of Wisconsin Division of Extension *Cultivating Your Farm’s Future Workbook for Farm Succession Planning in Wisconsin* is to guide farm families through the educational process with the help of a facilitator. Analysis of our focus group research indicates that for farm succession to succeed, there needs to be a trusted advisor that works with the farm to keep them on task and planning for the future.

Worksheets within the workbook are organized in sequential sections to help the facilitator keep the families on task. These sections include: “Where are you now?,” “Where do you want to be,” and “How do you get there?” Family members may complete the pertinent worksheets individually to identify their perspectives regarding where they are now and where they want to be. Completing the worksheets individually allows them to articulate their perspectives before sharing them with other family members. The facilitator ensures that all family members share their perspectives, that one person speaks at a time, and encourages those not speaking to actively listen to others’ perspectives. The goal is for all perspectives to be respectfully acknowledged. Hogge et al. (2017) state that many programs teach management and planning strategies, but few focus on communication and family dynamics. “Treating family members fairly and equally, dealing with off-farm heirs and addressing in-law relationships are often the largest obstacles farm families face when building estate plans” (Hogge et al., 2017, “Key points for successful Estate Planning Education,” bullet 4).

The participants’ request for a vetted professionals list is a dilemma for Extension educators. Many Extension services have written or unwritten policies that prohibit recommending one professional over others. Some states’

bar associations may have an agriculture section that could be used as a referral resource. If that is not available, it can be difficult to provide a list of professionals with farm succession experience. In an attempt to address this, workbook creators developed the *Interviewing Professionals for Farm Succession Planning* worksheet to help farm families become better-informed consumers of these types of services.

We were surprised by some farmers' reactions to these focus group meetings. One participant compared the focus group to a therapy session, as their tensions felt lighter after talking about them in a safe and open environment with peers. These comments highlight the role Extension educators play as facilitators and the role communication has in relieving tensions related to the farm succession process. We anticipated some reluctance to share experiences. However, participants quickly opened up and shared their very personal stories. We recommend Extension educators seek training or professional development on healthy coping and self-care strategies to prepare for the emotional aspects of facilitating succession planning conversations, as highlighted by one participant:

“The only concern I have with a coach [facilitator] is . . . I know you meet with a lot of people. That spreads you out pretty thin. I can't imagine going home and trying to sleep after hearing everything that we have told you about our personal situations and trying to figure out as a coach to do that. Are there more of you?” —Portage, D.

When planning future farm succession workshops, it is essential to think about “chunking” the materials. Participants at our focus groups commented that a full day of farm succession speakers is overwhelming. Participants identified the need to provide the information in smaller sessions with time to work on parts of the farm succession plan as a needed change to the current workshop structure in Wisconsin. Another suggested change was to provide sessions in various formats that allow for both generations to attend. The older generation prefers face-to-face meetings, while the younger generation prefers online presentations that can be attended at any time.

Changes to current farm succession marketing were also noted. Participants indicated that postcards are still the best way to gain the attention of farmers, with the use of social media identified as the second method. The title of the program is vital for attracting attendees. One participant noted that:

“Sometimes, it needs to be more of a shock value that will make someone come. A lot of people will say ‘[ugh] farm succession’ . . . those who are interested in it understand it[and may come], but

if you want to get someone who isn't quite thinking that you have to dumb it down.” —Melrose, H

Therefore, organizers should use titles that indicate the specific content covered in the session instead of a generic farm succession title.

Lastly, the most considerable change in programming efforts identified is the need for peer-to-peer discussion groups. Several participants identified the need for these groups to learn from one another or for a shoulder to lean on during difficult conversations.

This study could not identify if the suggested programmatic changes identified by these Wisconsin-based focus groups will be effective in farm succession planning across the United States. However, these authors believe that there is a high likelihood that these changes will be beneficial no matter what state the farm succession occurs in. This belief is based on the fact that the tensions in Wisconsin surrounding farm succession appear similar to tensions found in other states. Therefore, these authors encourage others to adapt their farm succession programming to include suggestions from these focus group sessions.

REFERENCES

- Braun, V., & Clarke, V. (2006). Using thematic analysis in psychology. *Qualitative Research in Psychology*, 3(2), 77–101. www.doi.org/10.1191/1478088706qp063oa
- Conway, S. F., McDonagh, J., Farrell, M., & Kinsella, A. (2017). Uncovering obstacles: The exercise of symbolic power in the complex arena of intergenerational family farm transfer. *Journal of Rural Studies*, 54, 60–75. www.doi.org/10.1016/j.jrurstud.2017.06.007
- Giraud, D., & Baker, J. (2020, May 28). *Farm and ranch succession in a rural California county: Extending the farm transfer project*. Retrieved December 15, 2020, from <http://cehumboldt.ucanr.edu/files/228665.pdf>
- Graeb, B. E., Chappell, M. J., Wittman, H., Ledermann, S., Kerr, R. B., & Gemmill-Herren, B. (2016). The state of family farms in the world. *World Development*, 87, 1–15. www.doi.org/10.1016/j.worlddev.2015.05.012
- Hachfeld, G. A., Bau, D. B., Holcomb, C. R., Kurtz, J. N., Craig, J. W., & Olson, K. D. (2009). Farm transition and estate planning: Farmers' evaluations and behavioral changes due to attending workshops. *Journal of Extension*, 47(2), <https://archives.joe.org/joe/2009april/a8.php>
- Hogge, J., Eborn, B., Packham, J., Findlay, R., & Harrison, S. (2017). Multiyear succession and estate planning for farm and ranch families. *Journal of Extension*, 55(4). Retrieved April 15, 2021, from <https://tigerprints.clemson.edu/joe/vol55/iss4/19>
- Pitts, M. J., Fowler, C., Kaplan, M. S., Nussbaum, J., &

Barriers to Farm Succession Programming

- Becker, J. C. (2009). Dialectical tensions underpinning family farm succession planning. *Journal of Applied Communication Research*, 37(1), 59–79. [www.doi.org/10.1080/00909880802592631](https://doi.org/10.1080/00909880802592631)
- Schmieder, C., Caldwell, K. E., & Bechtol, E. (2018). Readyng Extension for the systematic analysis of large qualitative data sets. *Journal of Extension*, 56(6). <https://archives.joe.org/joe/2018october/a2.php>
- United States Department of Agriculture National Agricultural Statistics Service (2019a). *Table 45 selected operation and producer characteristics 2017 census of agriculture — county data*. Retrieved November 1, 2020, from https://www.nass.usda.gov/Publications/AgCensus/2017/Full_Report/Volume_1,_Chapter_2_County_Level/Wisconsin/st55_2_0045_0045.pdf
- United States Department of Agriculture National Agricultural Statistics Service. (2019b). *Table 52 selected producer characteristics 2017 and 2012 census of agriculture state data*. Retrieved November 1, 2020, from https://www.nass.usda.gov/Publications/AgCensus/2017/Full_Report/Volume_1,_Chapter_1_State_Level/Wisconsin/st55_1_0052_0052.pdf
- White, T., & King, S. (2019, April 11). *2017 census of agriculture data now available*. Retrieved December 3, 2020, from <https://www.usda.gov/media/press-releases/2019/04/11/2017-census-agriculture-data-now-available>
- Woolf, N. H., & Silver, C. (2018). *Qualitative analysis using MAXQDA the five-level QDA® method*. New York: Routledge, Taylor & Francis Group.