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New England Workshops Increase Participant Knowledge of Farm Transfer Issues

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Abstract: During 2004-2006, Extension and non-profit groups in New England joined together to conduct 12 Transferring the Farm I workshops for 521 participants in six states. The workshops addressed farm transfer/business transition issues facing farm families through a 1-day workshop that included presentations on family communications, basic legal issues, farm linking, and conservation easements. A panel of farmers who had transferred their farms was included in the workshop. From workshop evaluations, the participants were highly satisfied with all aspects and showed statistically significant increase in knowledge in goal assessment, retirement planning, business transition, and estate planning.

Introduction

A partnership of colleagues from Extension and non-profit organizations across New England joined to address the need for family farm-succession education by conducting 12 workshops for 521 participants in six states from 2004 to 2006. The workshops were made possible through generous financial support from the Northeast Center for Risk Management Education. This multi-state, multi-organizational collaboration

has enhanced the success of our programming by leveraging resources, drawing a broad clientele, and creating a support network for farm families interested in farm transfer issues.

Farm transfer and business succession are neither new nor unique but do face ongoing challenges that seem to have increased in importance as the average age of New England farm owners has gone from 53.4 in 1992 to 54.3 in 2002 (U.S.D.A. Census of Agriculture).

The term "farm transfer" is used here to represent the complex combination of retirement planning, estate planning, and farm business succession within a dynamic family business context. In response to a regional need for farm transfer education, Extension specialists from the Universities of Connecticut, Maine, New Hampshire, Rhode Island, and Vermont, and personnel from Maine Farm Link, Land Link Vermont, and Land for Good, Inc. have cooperated in developing and delivering farm transfer workshops across New England.

Program Description

The workshop, called "Transferring the Farm I," was piloted throughout New England in 2003 based on a curriculum originally delivered in Vermont (Heleba, Parsons, & Sciabarrasi, 2004). The curriculum was further refined to create a multi-disciplined, multi-speaker approach that included a) family communication, b) ownership and asset transfer options, c) legal considerations, d) farmer-to-farmer learning, and e) resources to support farm families.

A licensed social worker led the first session, where participants completed personal assessments intended to identify values and goals among each generation that could be used to initiate family discussion. Effective communication and conflict management techniques were also discussed.

In the next session, an overview of transfer issues and tools were addressed, including planning for retirement, income needs, determining estate assets, federal inheritance taxes, wills, methods of transferring assets, business structures, and the need to consult specialists. Local attorneys described legal considerations when developing estate plans, wills, and farm business structures.

A section on Creative Solutions included the role of farmland conservation easements and/or farm linking services. Though these approaches tend to be unique, they were included to provide participants with information on alternative options if interested in conserving their farms and/or if no heirs were identified to take over the farm.

To conclude the workshop, a farmer panel shared experiences with farm transfer, including their assessments of what worked well, what did not work, the role service providers played, and advice they would give other farmers interested in a similar approach.

Workshop Participants

The workshops were attended by participants from all six New England states. Participation seemed reflective of New England's family farm population in terms of sex and age (Table 1). In many cases, two or more generations from the same family attended. Farm ownership among participants did not seem reflective of the general farming population, as a greater percentage of participants had corporations or limited liability companies (LLC) as opposed to the more common sole proprietorship.

Table 1.

Characteristics of Participants of Transferring the Farm I Workshops Offered from 2004 to 2006

| Characteristic | Participants (Valid Percent)* |
|-------------------------------------|--------------------------------------|
| Gender: Female | 47.0 |
| Gender: Male | 53.0 |
| Age: More than 65 years | 25.2 |
| Age: 56-65 years | 30.7 |
| Age: 36-55 years | 34.1 |
| Age: 35 years or younger | 10.0 |
| Farm ownership: Sole proprietorship | 61.3 |
| Farm ownership: Partnership | 18.6 |
| Farm ownership: Corporation or LLC | 20.1 |
| Have tax-deferred account | 71.2 |
| * N=281 | |

Steps that participants had taken to pursue their transfer were assessed. The majority of participants had taken at least one step (Table 2).

Table 2.
Transfer Actions Taken by Transferring the Farm I Workshop Participants*

| Specific Action | Responses (Valid Percent) |
|----------------------------------------------------------|----------------------------------|
| No Steps Taken | 13.2 |
| Discussed transfer issues with family members | 69.0 |
| Met with an ag professional (Extension, etc.) | 32.0 |
| Met with a service provider (Attorney, etc.) | 38.8 |
| Attend other transfer workshops | 33.1 |
| Wrote or updated will | 27.4 |
| Changed business structure to include younger generation | 13.2 |
| Developed a business plan | 17.1 |
| Other | 6.8 |

* Participants of Transferring the Farm I Workshops offered from 2004 to 2006 were asked to indicate the actions they had taken within the past five years. Participants could respond to more than one action. N=281.

Results

Workshop evaluations revealed that participants were satisfied or very satisfied with the workshop overall and its organization (Table 3). No statistical differences in the level of participant satisfaction were found with regard to year or state attended or age or sex of the participant.

Of the topics covered, the family communication section was the most highly rated, followed by the legal presentation and farmer panel. The lowest ranked section was Creative Solutions, which included presentations on land conservation programs and farm linking services for non-related farming parties. Again, no statistical differences in the level of satisfaction were found based on age, state of residence, sex, or farm ownership.

To determine the effectiveness of the workshop, the participants were asked to rank their level of knowledge on relevant topics before (as a post-reflective exercise) and after the workshop. Results indicated a statistically significant increase in participant knowledge was achieved in the four areas measured (Table 4). As many as 44% of participants ranked their knowledge before the workshop as low (scores of 1 or 2). However, less than 5% of participants ranked their knowledge as low after the workshop.

Table 3.
Participants' Level of Satisfaction with Workshop^a

| Topic | Percentage of Responses ^b | | | | | Mean Score ^c |
|-----------------------|--------------------------------------|-----|------|------|------|-------------------------|
| | 1 | 2 | 3 | 4 | 5 | |
| Overall Workshop | 0.0 | 0.7 | 4.1 | 32.8 | 62.4 | 4.57 |
| Workshop Organization | 0.0 | 0.0 | 1.6 | 30.9 | 67.6 | 4.66 |
| Family Communication | 1.5 | 1.8 | 9.9 | 42.6 | 44.1 | 4.26 |
| Tools and Techniques | 0.4 | 3.0 | 15.7 | 48.7 | 32.2 | 4.09 |
| Legal Aspects | 0.7 | 2.6 | 12.4 | 39.7 | 44.6 | 4.25 |
| Creative Solutions | 0.8 | 4.2 | 17.2 | 47.1 | 30.7 | 4.03 |
| Farmer Panel | 0.4 | 2.6 | 13.6 | 32.9 | 50.4 | 4.30 |

^a Participants rated their level of satisfaction on a Likert scale with 1 = very dissatisfied to 5 = very satisfied.
^b N=281. Valid percent scores reported.
^c No statistically significant differences occurred between mean scores or among scores based on age, workshop location, or sex at the p <0.05 level.

Table 4.
Participant Knowledge Level of Topics Addressed in the Workshop^a

| Workshop Topic | Rating of Knowledge Level (Valid Percent) | | | | | | Mean ^b | St Dev |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------|------|------|------|------|-------------------|-------------------|--------|
| | 1 | 2 | 3 | 4 | 5 | | | |
| Assessment of Goals: Prior to Attending | 4.8 | 24.6 | 40.4 | 23.2 | 7.0 | 3.03 ^c | 0.98 | |
| Assessment of Goals: Post-workshop | 0.0 | 1.5 | 11.1 | 58.7 | 28.8 | 4.15 ^c | 0.66 | |
| Retirement Planning: Prior to Attending | 7.7 | 28.8 | 38.3 | 18.2 | 6.9 | 2.88 ^c | 1.02 | |
| Retirement Planning: Post-workshop | 1.1 | 3.7 | 20.5 | 52.4 | 22.3 | 3.91 ^c | 0.82 | |
| Business Transition: Prior to Attending | 12.3 | 31.3 | 39.9 | 12.7 | 3.7 | 2.64 ^c | 0.98 | |
| Business Transition: Post-workshop | 0.4 | 2.6 | 20.0 | 55.5 | 21.5 | 3.95 ^c | 0.75 | |
| Estate Planning: Prior to Attending | 12.9 | 30.9 | 36.4 | 14.7 | 5.1 | 2.68 ^c | 1.04 | |
| Estate Planning: Post-workshop | 0.7 | 1.9 | 17.4 | 50.4 | 29.6 | 4.06 ^c | 0.78 | |
| ^a In the post-event evaluation, participants were asked to rate their knowledge before and after the workshop on the topics presented. Questions were coded on a Likert scale with 1=low level of knowledge to 5=high level of knowledge. ^b There were no statistically significant differences in mean scores based on age, workshop location, or sex based at the p<0.05 level. ^c Statistically significant difference between pre and post-workshop scores at the p<0.01 level. | | | | | | | | |

Conclusions

The delivery of the Transferring the Farm I workshop was an effective way to increase participant knowledge of farm transfer issues in a manner that was satisfying to participants.

Presentations by multiple speakers, including family specialists, Extension professionals, attorneys, and farmers seem appealing to farm families. Given the complexity of the topic, this seems like a rational approach to continue. Hearing about alternative options (through the Creative Solutions section) may not be effective and should be evaluated as part of this curriculum.

Although the program was a success, responses to open-ended evaluation questions indicated that participants perceive a number of challenges to transferring their farms, including legal complexities and starting the process. To address these challenges, follow-up activities, including an advanced workshop and

technical assistance, have been developed and will be analyzed in further detail.

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