

## **Curriculum Helps Families Discuss and Plan for Future of Their Woodland or Farm**

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**Abstract:** *Succession planning is an important step for families owning woodlands and farms that wish to maintain the character of the land and continue the families' connection to it. We introduce Ties to the Land, an educational curriculum that helps families communicate more effectively about the fate of their land and how to transition to future managers.*

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## **Introduction**

When 140 people showed up in November 2004 for a workshop on how to pass their family woodlands on the next generation, we learned that succession planning was a critical issue for many families. Approximately 50% of Oregon woodland owners are age 65 or older—including 19% age 75 years or older (Oregon Forest Resources Institute, 2004).

Like farmers, an aging senior generation of forest landowners ponders how to pass the land and responsibility for its care on to another generation. Extension has responded with effective local educational programs for farm families that improved participants' knowledge about estate or succession planning (Ehmke & Miller, 2008; Heleba, Parsons, Sciabarrasi, & Anderson, 2009). Yet there is little such educational programming for woodland owners.

## **Program Description**

The Ties to the Land curriculum was developed to help address that void. It is a practical introduction to succession planning for woodland owners. The curriculum package includes:

- Pre-recorded Ties to the Land Facilitated Workshop on DVD
- The *Ties to the Land* workbook (76 pages)
- <<http://tiestotheland.org>>

## Supporting materials for local facilitators

- Evaluation and assessment tools

The pre-recorded workshop is at the heart of the curriculum. It uses a case study approach and classroom activities to help families understand the succession planning process. The case study shows how expert information and advice is used within the context of a fictional family whose challenges and dynamics are familiar to those of many families.

The workshop covers the full range of topics relevant to succession planning, from vision setting through ownership options. Because it is a key factor for successfully navigating the succession planning process (Kaplan, Nussbaum, Becker, Fowler & Pitts, 2009), the workshop emphasizes the role of communication. Classroom activities and the interaction they trigger, both within and between families, are an important element of the workshop. The workbook, which expands on the case study used in the workshop, provides a way to involve other family members and serves as a reference throughout the planning process.

The pre-recorded workshop is presented in six modules (totaling 2 hours and 20 minutes of content), with five planned activities between the modules. The workshop is comfortably accommodated in a 5-hour program span, and can be done in one, two, or more sessions. Split sessions require more set up and travel, but allow time for family members to begin working through the process as part of the program. The format allows flexibility in scheduling and structure, and can accommodate additional live content through invited speakers, landowner panels, or Q&A with local professionals (lawyers, financial planning advisors, or consulting foresters).

The workshop is designed with Extension educators in mind: it is a content-ready, turnkey program easily facilitated in any location where a laptop, projector, and supplemental audio can be set up. Workshop facilitators do not need to be content specialists. The basic content is provided by the presenters on the DVD. Extension can take the lead in putting on the workshop or coordinate with local groups and organizations (such as American Tree Farm and other local woodland organizations or Farm Bureau). In either case, Extension educators' critical role is to provide effective facilitation for the group activities and discussions.

## Identified Benefits

The Ties to the Land curriculum is being used in 11 states across the country, and over 2,000 families have participated in the program. It has been recognized for excellence by the Association of Natural Resource Extension Professionals. The curriculum has been commended for quality, ease of use, and impact by those using it to provide succession-planning education for their audiences.

- "We just finished this program and I've got to say it is one of the best programs I've ever done."
- "You don't have to create it; it's packaged and ready to go. You can put on a valuable workshop without developing a lot of content."
- "Real advantages of Ties to the Land program it's a much more user friendly digestible format and really moves people forward. It makes it seem doable."

Of greater importance is that workshop facilitators consistently report that participants generally feel the program was useful and that many were prompted to take steps towards developing a succession plan. Some participant comments include the following.

- "Real advantages of Ties to the Land program it's a much more user friendly digestible format and really moves people forward. It makes it seem doable."
- "It has made a big difference in getting the ball rolling."

- "It gave us a definite direction for a vague problem that seemed unsolvable."

## Challenges and Lessons Learned

We all know people are busy. Workshop facilitators have used a number of strategies to increase attendance at their workshops: advertising well in advance; partnering with other organizations that serve landowners such as land trusts, Soil and Water Conservation Districts; and hosting a workshop (or the first session) within the context of a larger event for landowners.

Very few natural resource educators have expertise in succession or estate planning. While the program is designed to be used by those without topic expertise, and though it gives a strong introduction to the topic, invariably there are questions that are best answered by legal and accounting experts. This creates an uncomfortable situation for some. If choosing to go beyond the introductory content, many facilitators rely on invited speakers. Breadth may require multiple presenters, which also presents scheduling challenges and potential speaker fees.

Even though it can be challenging to draw people in to a program that requires consideration of their demise, the Ties to the Land curriculum fills a long-unfilled gap in programming for family landowners. It is but one tool Extension professionals can use to help our woodland, farm, or forest clientele address one of the key challenges of their future.

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