

Family Communication and Multigenerational Learning in an Intergenerational Land Transfer Class

Abstract

Recognizing intergenerational differences sets the stage for sharing and learning across the generations. An intergenerational land transfer education class was designed to engage families around the issue of parcelization and development of forested lands. A post-class survey of the Intergenerational Land Transfer class was used to evaluate outcomes. Recognizing intergenerational differences in learning was found to be important in catalyzing family discussion and protect working forestlands. This article provides an example of a multi-generational approach to teaching. This approach has implications for program areas beyond agriculture and forestry.

Michael Reichenbach
Extension Educator,
Forestry
Cloquet, Minnesota
reich027@umn.edu

Becky Hagen Jokela
Extension Educator,
Family Resource
Management
Cloquet, Minnesota
hagen022@umn.edu

Eli Sagor
Extension Educator,
Forestry
St Paul, Minnesota
esagor@umn.edu

University of
Minnesota Extension

Introduction

Recognizing intergenerational differences sets the stage for sharing and learning across the generations. A team of Extension educators from the University of Minnesota focused on addressing the issue of parcelization and development of forested lands through helping families pass their management ethic and their land to the next generation. To address this issue an intergenerational land transfer class was designed. The target audience for the class included all family members who might be involved in the management and ownership of the land. To engage this audience, there was a need to recognize intergenerational differences in learning.

This article provides an example of an interdisciplinary and multi-generational approach to addressing an important social issue. The class design builds on the Ties to the Land Curriculum developed at Oregon State University (Bentz et al., 2006). The land transfer class in Minnesota was piloted, refined, and after 3 years of program delivery evaluated using a survey. Background about the importance of the land transfer class, the class's multi-generational components, and the survey results are presented. Finally, implications for Extension programming are discussed.

Background

Families and individuals own about 5.3 million acres of Minnesota's forestland (Butler 2008), almost

1/3 of the state's forested land area. As owners age, a large-scale change in ownership and control of this land looms. This is an important social issue because of the economic and environmental benefits forests provide. Butler and Leatherberry (2004) reported the average age of the family forest owner as 60. Of concern is parcelization and development of forestland. Mundell, Taff, Kilgore, and Snyder (2010), state, "This development activity can change the face of a landscape or a community, and can result in substantial ecological, economic and social ramifications" (p. 75). Even if the land is not developed, parcelization can reduce its environmental and economic value. While the land may remain in forest after subdivision, economies of scale associated with larger tracts of land are lost (Row, 1978; Straka, Wisdom, & Moak 1984). Avoiding unwanted land subdivision might help to keep more of Minnesota's forestland forested.

Anecdotal evidence suggests that many family woodland owners want to keep their land in the family, but do not know how to transfer ownership to the next generation. University of Minnesota Extension's Intergenerational Land Transfer (ILT) class is designed to provide participants the tools needed to successfully plan their land transfer. Family discussion about what the land means to each family member, how the land is to be managed in the future, and the legal tools needed for successful property transfer are keys to success (Russell, Griffin, Flinchbaugh, Martin, & Atilano, 1985). Similar to other Extension estate planning and land transfer offerings (Heleba, Parsons, & Sciabarrasi, 2004; Heleba, Parsons, Sciabarrasi, & Anderson, 2009), Minnesota's ILT class focuses on both family communication and legal and financial tools. The process of families sharing their intergenerational perspectives was shown to enrich Land Transfer education, family decision-making and relationships, suggesting implications for other Extension program areas.

Between 2007 and 2010, University of Minnesota (UMN) Extension offered nine, two-part classes on ILT to Minnesota woodland owners and members of their families. In June of 2011, a survey of class participants was conducted to identify actions taken by family members to prepare for the transfer of land from one generation to the next. Expected actions that might be taken to prepare for the transfer of land included family communication, contacting a forester, certified public accountant (CPA) or attorney, and the development of legal structure, such as a will, trust or limited liability company. The evaluation was conducted to understand both what landowners did regarding succession planning and the landowners' confidence that their land would remain forested, as the next generation assumes ownership.

The UMN Extension's ILT class incorporates content from two UMN Extension program areas: Forestry and Family Resource Management. Two primary resources are provided to participants, *Ties to the Land* (Bentz et al., 2006), and *Who Get's Grandma's Yellow Pie Plate?* (University of Minnesota Extension Service, 1999). The emphasis of both resources is on multi-generational family communication. The *Ties to the Land* resource focuses on succession planning for titled property, while the focus of *Grandma's Yellow Pie Plate?* is on the transfer of non-titled property. Content and learning activities are designed to inform individuals and families of their options and assist in their decision-making process. The class is offered in two parts: Part one on family communication and part two on legal methods used in land transfer. Consistent with the "Do's and Don'ts" of land transfer education (Fetsch, 1999; see also Hachfeld et al., 2009), the ILT class content includes 1) the consequences of being unprepared, 2) family communication, 3) values and goals, 4) how to hold a successful family meeting, and 5) legal and financial tools.

Multi-Generational Class Components

Recognizing intergenerational differences sets the stage for learning across the generations. Preferred methods of learning may be very different for various generations. These methods have been described by Hagen Jokela, Hendricksen, and Haynes (2009), along with teaching techniques and activity suggestions. For example, individuals from the Depression Era relate well to small group sharing and telling of stories. Baby Boomers may prefer case studies as a means to provide a framework for group discussion. Gen-X members may appreciate materials that are visually appealing. The challenge is to make content relevant to participants of all generations, capturing their interest and encouraging participation in land transfer discussions, leading to constructive communication and decision-making within the family.

Using case studies, the heirloom-scale activity, and sharing stories were the main techniques used to engage family members from multi-generations. Cautionary tales about what can go wrong when families fail to plan were used to elicit discussion. These tales are described in Ties to the Land Curriculum The Heirloom Scale, from Ties to the Land curriculum was used as a tool to elicit different family members' hopes, dreams, and thoughts about their land (Bentz et al., 2006). This tool was shown to be useful in assisting individuals, as they identify their personal perception of family land importance, contributing to the family decision-making process.

The scale continuum goes from left to right, indicating the following: 1 = "My property is one of the financial assets in my portfolio and nothing more"; and 10 = "My property is a priceless family heirloom to be protected at all costs." Using the scale, individuals think through how important the land is to them personally. They indicate this importance, by placing a mark on the continuum. In class we used a poster size scale and secured it to a wall. Participants placed post-it notes or sometimes physically stood by the numerical position to indicate the importance of the land to them. After taking the Intergenerational Land Transfer Class, 32 participants out of 62 reported using the Heirloom Scale at home with their families. Finally, stories were used to teach about the legal tools available for land transfer. Sharing stories proved to engage audiences from multiple generations.

Post-Class Evaluation Survey

A post-class survey was used to explore outcomes of class participants' experiences with the ILT classes taught between August 2007 and October 2010. The survey was administered in June 2011. The nine classes were attended by 168 persons representing an unknown number of family groups. Many participants attended in family groups of three or more. Individuals were not identified by families in the registration information, therefore, the number of families attending classes is not known.

Open- and closed-ended questions were used to elicit responses about class experiences and actions taken as the result of participation in the class. Identical surveys were administered in both paper and electronic format. Participants receiving paper surveys were asked if they wanted to respond via paper or email. To ensure that only one response was counted per individual, a coding procedure tied to password was used.

Responses to the survey questions were analyzed using a mixed methods approach. Frequency responses were tabulated for closed-ended questions. A phenomenological approach was used to gain an understanding of the participants' experience of the class. In interpretive phenomenology the meaning of the participant's experience is derived from "the blend of the researcher's understanding of the phenomenon, participant-generated information, and data obtained from other relevant sources" (Wojnar & Swanson, 2007, p. 175). Each respondent's answers from both closed- and open-ended questions were taken as a whole and reviewed, read, and analyzed. The meanings in this data are condensed and summarized. To provide for verification of results, two of the investigators conducted this process separately. This approach is consistent with the approach described by Hycner (1985) for analysis of phenomenological data.

The purpose of evaluating the ILT class was to understand:

- What class participants wanted in an ILT class,
- What participants found valuable in a succession planning class,
- What participants did as a result of class, and
- How landowners perceive the future fate of their land.

The objective of the survey was to make a judgment about the efficacy of the class as a means to keep forestland forested and to judge the efficacy of an interdisciplinary and multi-generational approach to teaching.

Results

Surveys were sent to 107 class participants for whom valid email or postal mail addresses were available. The total number of usable responses was 71, resulting in a 66% response rate. These responses represented 41 family groups. Inferences to the entire class were not made due to the potential for non-response bias.

Participant Expectations Regarding the ILT Class

The participants expected that they would learn how to successfully transfer the family forest or cabin to the next generation. One participant noted, "My dad . . . organized a few members in our family to attend. I went with the hope of learning how to start this conversation . . ." The ILT lesson plan is well aligned with learners' motivations for attending. Also, several participants noted that they did not expect so much emphasis on family communication.

Benefits Participants Reported Receiving at the ILT Class

Many participants reported being confident that their hopes and dreams could be realized. One participant noted that the class increased confidence engaging in family discussion and increased actions toward planning for land transfer. Additional comments included the following.

- "The class gave us confidence to bring up the idea of having a meeting."
- "It may not be the topic you want to discuss, but one that must be discussed. Action must be taken to insure your desires are met when you're no longer around."
- "It helped us develop a process that will help us move our plan forward."
- "The most important thing I learned is to first determine how each family member perceives the land, and to find out their future 'vision' for the land."

Actions Taken

Participants reported that as a result of the class they took various actions. Some participants contacted an attorney, forester, or CPA for the specific purpose of making a plan to pass the property to the next generation. Examples of participant actions include the following.

- "We found out that all 3 kids want to inherit the property together, to keep it in the family by forming a LLC [limited liability company]."
- "I obtained general information needed that allowed me to go forward in transferring the land."
- "The information provided prompted a meeting that we would not have done or at least not as informed."

Regarding the use of legal tools, 16 out of 51 respondents took action to work on their will; 13 out of 42 respondents took action to initiate a trust agreement; and 13 out of 35 respondents initiated actions to prepare a limited liability company (LLC).

Thirty-two out of 62 respondents reported using the Heirloom Scale at home with their families. The Heirloom Scale is used to elicit discussion about the property with priceless treasure and a financial asset at opposite ends of a continuum.

Understanding the Participants' Experience of the ILT Class

Family communication was mentioned by most participants as the most important learning outcome from the class. The legal issues related to land transfer were also important to participants. The LLC and the transfer on death deed were two legal tools that several participants had not known about prior to class.

Regarding what additional content participants might want in an ILT class, several participants identified more details on legal aspects of land transfer. Many participants suggested a follow-up class to review key understandings and progress toward land transfer goals would be helpful. A few wanted a list of facilitators, certified public accountants (CPA's), and attorneys, and the costs of such services.

Participants reported that *Ties to the Land* (Bentz et al., 2006) and *Who Gets Grandma's Yellow Pie-*

Plate? (University of Minnesota, 1999) provided opportunity for discussion and self-directed follow-up.

Perceptions of the Future

One of the goals of the ILT classes is to reduce unwanted subdivision of forestland. Following the class, participants were asked to rank using a 5-point scale whether it was "not at all likely" to "very likely" that the property being transferred will remain in forest over the next 20 years. Out of 67 valid responses, 62 indicated it was either likely or very likely that their land, totaling more than 11,000 acres, would remain forested over the next 20 years. While this may indicate that the classes were successful in keeping forestland forested, it is not known how many persons may have thought that the land would have remained forested prior to the class.

Another goal of the ILT class is to encourage quality family communications about land transfer. Family communication is considered crucial to the successful transfer of land to the next generation (Kaplan, Nussbaum, Becker, Fowler, & Pitts, 2009). While some participants had nearly 3 years to take action and others only 6 months, the data show that nearly all participants took action regarding family communication.

The following is a summary of the analysis of the 5-point Likert type questions ranked on from "not at all" to "a great extent." Out of 68 responses, 60 participants indicated that the class helped them share their hopes, dreams, and ideas about land transfer with their family either somewhat or to a great extent. Also, out of 68 valid responses, 53 indicated that the class helped them participate in family decisions regarding land transfer somewhat or to a great extent. Out of 66 valid responses, the class helped 54 participants experience positive family communication either "somewhat" or to "a great extent." Out of 65 valid responses, the class provided 52 participants confidence that their wishes for the future of the land would be realized.

Conclusion

The study reported here demonstrated that the model used in the UMN Extension's ILT class is effective at engaging families in planning for land transfer. The intentional combination of teaching family communication and teaching about legal tools to use in land transfer was shown to be beneficial to family forestland owners, and the curriculum design contributed to actions taken after class. The data collected provided evidence that the combination of teaching about family communication and the legal aspects of land transfer elicited rich discussions, was well received by participants, and thus resulted in a positive difference in the family decision-making process. Overall, the ILT class was effective at catalyzing actions, including family discussion, contacting professionals, and developing a forest management plan, a will, or a limited liability company (LLC). Respondents reported that the class was effective at helping them plan for the future and to keep their land forested. With an effective class delivery model the remaining challenge is one of "scale," how to reach a greater number of the aging population of landowners.

Implications for Extension

The results obtained in the Land Transfer program would not have occurred without an

interdisciplinary approach and attention to multi-generational issues. Kaplan et al. (2008) provide a vision for Extension, "where the majority of Extension professionals are able to 'think intergenerationally' and have the leadership and content area skills to utilize and incorporate intergenerational methodologies for promoting positive youth and adult development, strengthening families, and building more cohesive communities" (p. 12).

Thinking intergenerationally was demonstrated throughout the land transfer class. The emphasis was on bringing multiple generations into the classroom to encourage communication through discussion and participation in selected activities. Rather than only being focused on transferring land or passing a management ethic on to the next generation, session time was designed to engage family members, providing an opportunity for them to share individual perspectives, affecting family goals and decisions. For example, promotional materials encouraged participants to attend the class as a family. Web-based tools were used to connect families residing too far away to travel to the physical class location. This permitted families to connect in real time to hear the class content, participate in discussion, and initiate decision-making within their own family. Activities included sharing stories, case studies, and the Heirloom Scale. According to Peters & Franz (2012), "It is by *storying and restorying* facts, events, and actions that we communicate and come to know or assert or contest their meaning and significance." Intergenerational programming brings people together to learn from one another and explore possibilities.

While challenging, the work has been exciting as it addresses important issues, it uses many different modes of teaching, it is engaging and the data support using an interdisciplinary and multi-generational teaching approach. Consideration of multi-generational perspectives within natural resource Extension programming as well as in other Extension program areas, can enrich audience engagement, foster increased understandings of content, and create increased participant awareness of the need for action.

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