

Intergenerational Land Transfer Program: A Cross Program Collaboration

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Abstract

The University of Minnesota Extension's Intergenerational Land Transfer education program, is provided to families as they engage in communication about keeping the forest intact, and passing hopes, dreams and the management ethic to the next generation. Support is also provided to help families' select appropriate financial and legal tools to enable the land transfer process. The University of Minnesota Extension offered 22 intergenerational land transfer workshops, webinars and classes between 2007 and 2015. For the workshops taught during this time frame, Extension Family Resiliency and Forestry educators surveyed 107 workshop participants to assess workshop efficacy. Educators were interested in whether or not there was an increase in family communication and working forestlands protected following the workshop. Participants indicated increased confidence levels in their ability to successfully transfer their hopes and dreams, management ethic and land to the next generation.

Key words: intergenerational, land transfer, resource management, family communication

Introduction

The Intergenerational Land Transfer (IGLT) workshop provides support to families as they consider options for passing their land from one generation to another. The curriculum fosters learning and communication about passing hopes, dreams, and the land management ethic to the next generation.

Support is provided to families to help them select appropriate financial and legal tools for the transfer of the land. Family communication has been identified as an essential component for successful property transfer. Research has continued to support the importance of family communication and relationships in family business succession planning (Davis 1999; Fetsch 1998; Withrow-Robinson, Broussard Allred, Landgren, and Sisock 2013).

Program Description

The IGLT workshops are based on an educational model described by Mezirow (1993). This model includes three parts: 1. Create awareness of the need to take action, 2. Create space for participants to enter into dialogue and deliberation regarding what actions might be possible, and 3. Provide training in how to take action. Participants in the IGLT workshops often hope to pass their land to the next generation and they may focus on the legal process of transferring the land. (Withrow-Robinson et.al. 2013). What participants don't know is that they also need to take action to communicate with family members. The IGLT workshop addresses both issues.

The IGLT workshops consist of two parts. Part 1 is family communication, and centers on passing the hopes and dreams or land ethic to the next generation. Part II is about legal options for facilitating land transfer. We contract with an attorney who specializes in family forest and cabin transfer planning.

The workshop content helps participants consider their options. Workshop content can be found in figure 1.

Figure 1. Typical Agenda for a Land Transfer Workshop

Agenda: Legacy Planning: Intergenerational Land Transfer

Friday, October 2, 2015 9:30 AM to 4:00 PM

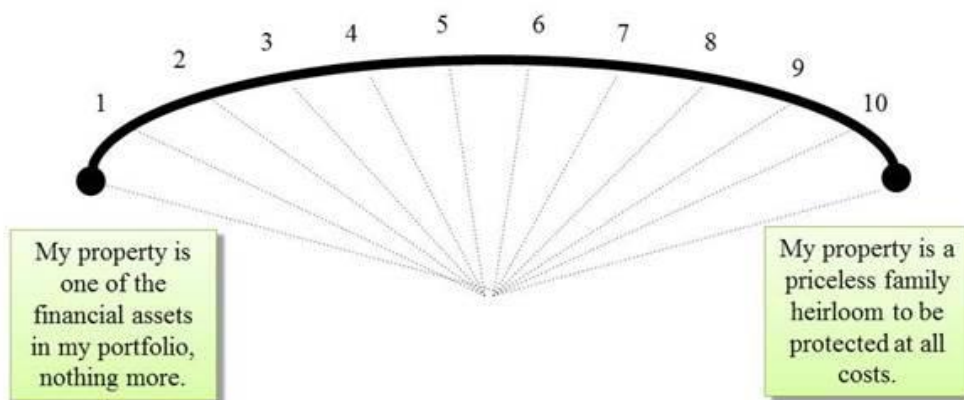
Agenda	Part 1: Planning and Communication
9:30 AM	Welcome, Introduction and Overview
10:00 AM	Successful Family Communication
11:30 AM	Conservation Easement Programs and Land Trust
12:15 PM	Lunch
Agenda	Part 2: Making Your Vision a Reality
1:00 PM	Legal Tools for Land Transfer
2:30 PM	Small Group/Family Conversation and Questions
3:30 PM	Wrap-up and Evaluations
4:00 PM	Adjourn

Family members may have differing perceptions about fairness regarding distribution the land and this may lead to family conflict and subsequent sale of the land to new owners (Jaffe, 1990). To reduce differing perceptions of fairness, family meetings can be used to discuss distribution decisions, succession of the forest management goals and the process used to transfer land ownership. If all members of a family understand and accept each other's viewpoints, conflict may be reduced.

The succession of values, goals and objectives between generations may also involve family meetings. These “meetings” can involve fun, hands-on activities such as hunting, tree planting, pruning, thinning and other forest management activities. It is never too early, or late, to involve the children and grandchildren in the hands-on management of the forest property.

Family meetings are encouraged to foster communication. An activity that can be used to help families learn about each other's viewpoints is the *Heirloom Scale*. (See figure 2) At opposite ends of the scale are finance and emotional attachment values.

Figure 2. The Heirloom Scale (adapted from Bentz and Green, 2006)



The purpose of the land transfer workshop is to protect working forestlands. Unless family forest landowners know how to pass their land from one generation to the next, working forestlands are often subdivided. This results in a loss of environmental, social and economic values (Bentz and Green 2006). Through the IGLT workshop, participant's eyes are opened as to the complexity of land transfer decisions. A unique opportunity exists to connect with family members to communicate their hopes and dreams about the land. Family members are able to discover potential issues and support for protecting forestland.

The IGLT program focuses on: Multi-generational family dynamics, family land ethics, legal aspects of land transfer, and builds on the experience of Extension Educators across the United

States. Also, the program applies this learning to educational programs at the local level, aimed at helping landowners know their options for protecting forestland. A blending of content from forestry and family development assists in achieving the dual purpose of supporting families in their decision making process. Extension Educators teach participants program expertise, tools, and involve families in hands-on-activities.

Participants

Between 2007 and 2015 Extension offered 22 workshops, webinars and classes to 406 participants. Families might be a more appropriate measure of who we reach. Based on average size of families we have reached over 100 families (this includes immediate and extended family members). The largest number of family participants at one workshop from one family was 18, although 3 or 4 persons per family is more common.

Results and Discussion

The collaborative effort between Family Resiliency and Forestry to foster family communication and learn about options for land transfer has resulted in increased participant learning. Fostering family communication is to create opportunity for families to have discussions about land transfer. We found that families who develop successful plans for land transfer also recognize the importance of family communication.

For example, a family consisting of twelve individuals attended a workshop. Family members were represented across the generations. The individuals participated in the Heirloom Scale activity by placing an initialed post-it note on the scale, which represented their personal feelings about the land. It was exciting to observe how the family interacted with one another, communicated, reacted to differing perceptions about land importance, and made plans for a decision making family meeting. The workshop content and tools provided supported this family in retaining the land for future generations. During this communication process, land memories are shared, remembered and re-told to younger generations.

As a result of encouraging learning and communication through hands-on exercises we have found participants engage in rich discussion during class, at lunch breaks, and after class. This discussion is often the first time families have been able to share individual hopes and dreams regarding their land.

The land transfer workshop provides a framework for family succession planning by addressing both family communication and financial and legal tools. As a result of our workshops held between 2007-2010, 107 class participants were either “likely” or “highly likely” to keep 11,000 acres of land forested over the next 20 years. In addition, 53 out of 68 respondents indicated the

workshop helped them engage in family decisions regarding land transfer and 60 out of 68 respondents indicated the class helped them share their hopes, dreams and ideas about land transfer with family (Reichenbach, Hagen Jokela, and Sagor 2013). Since that study was conducted, workshop participants have consistently said, “The class increased my confidence in engaging in family discussions and increased actions towards planning for land transfer.” In addition, workshop participants often reported less family conflict and improved ability to address issues of “fairness.” If family members are able to listen with empathy and perspective to other family members talk about their hopes and dreams, they often find a common understanding regarding fairness (Olsen and Osborn 2006).

Through communication, family members are able to share their hopes and dreams for their land. Generational sharing of stories can help to identify land meaning and memories, contributing to the family decision making process.

To encourage additional participation in our land transfer program, we are offering an introduction to land transfer through one hour webinars. To date, we have offered three webinars, reaching 161 individuals. End of session evaluations indicate participants have taken steps to plan for the transfer of their land from one generation to the next.

Conclusion and Implications

It has been demonstrated that the land transfer education program is effective at engaging families in developing succession plans. Reichenbach, Hagen Jokela and Sagor (2013, conclusion) stated, “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 owner’s and the curriculum design contributed to actions taken after class.” These authors also showed “evidence that the combination of teaching about family communication and the legal aspects of land transfer . . . was well received by participants, and thus resulted in a positive difference in the family decision making process.”

This program has been instrumental in supporting families as they make important land decisions. Families may experience challenging issues which can create difficult and emotional situations. Examples may include: Negative perceptions of fairness, stressful relationships, and a delay in decision making.

Currently, we are conducting a follow-up evaluation, in order to obtain further data to highlight program outcomes, as to what difference the education made in participant's lives.

References

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