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# KEEP WORKING HANDS ON WORKING LAND

Strategies for Effective Farmland Transitions,  
Succession Planning, and Landowner Education

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Portfolio submitted in partial fulfillment of the requirements for the degree of Master of Science in  
Environmental Studies, University of Montana, Missoula, MT, May 2023

## Acknowledgments

I feel so lucky to have been welcomed into a very special community. Missoula, and all the special people I have met here have shown me the meaning of happiness, generosity, and pure authentic joy. All the incredible experiences during graduate school including Summer PEAS, EVST retreat, Collaborative Approaches Summit, Ovando Girls Trip, weekly rock-climbing dates, Clark Fork River floating, holiday parties (2x costume winner), Hot Spring days, swing dancing, KettleHouse concerts, hiking the bitterroot, and dancing in the park. Everyone I have met these past two years are the true VIPs. I could not have done it without you and Gild Burritos.

*Special thanks to (in no particular order) ...*

**Neva Hassanein:** You have been a great advisor and advocate for me. Thank you for your support and guidance during my two years here. I appreciate all the times you encouraged me to step out of my comfort zone, and pushed me to be a better writer, student, critical thinker, and community activist.

**Caroline Stephens:** Thank you for getting me back into the soil! You and the PEAS farm crew helped me develop a deep sense of place. I feel very lucky to have worked with you in the classroom and in the fields. You are a talented and valuable teacher.

**Mary Ellis and Community Food and Agriculture Coalition:** Thank you for being such a critical part of this portfolio and being an influential part of my professional growth. Mary, you were an awesome boss and mentor.

**Sarah Tilt and One Montana:** Thank you for your support over the past year on such an important project. I feel very lucky to have had the opportunity to work with you on this project, and to have talked to so many incredible people doing important work in the farmland access sector.

**Kelly Beevers:** I really appreciate all the thoughtful conversations we had this year! You have deeply shaped my personal and professional growth.

**Robin Saha and the Environmental Studies Department:** Thank you for the opportunity to be a part of a program so special. Rankin felt more like a family living room than a common room, and I hope that never changes.

**My Friends and Classmates:** Without you, I wouldn't have experienced such exquisite wine and cheese nights filled with laughter, genuine conversations, and memories to last a lifetime.

**Anna Butterfield and Bryce Butterfield:** For feeding me, for making me laugh on my worst days, for your keen editing skills, and for checking in on me constantly, and being my biggest cheerleaders.

**My Family:** Thank you for the endless love and support. These past two years have been a long and bumpy road, but the road leads back to you, where I belong.

**Silas Fox:** Thank you for being by my side for every tear, every peptalk, every venting session, every laugh, and all the emotions in between. You never let me forget how smart and strong I am, and I cannot thank you enough for the endless love, support, and much needed hugs. Atlas and I are lucky to have you.



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## ***I. Introduction***

While the next generation of farmers and ranchers seeks access to viable farmland, aging landowners are thinking about the next life for their land. In Montana, the average age for all agricultural producers is 58.9, climbing 1.1 years from 2007-2017 (Sommer 2017). In one national survey, two-thirds of retiring farmers did not have an identified successor (Land for Good 2021). The lack of an identified successor and proper planning of farmland and on-farm business transition is an issue that continues to grow as demographic and generational changes occur. Many farmers lack an intergenerational successor interested in taking over their business. Even when children are interested in farming, handing over the operation could leave the farmer and spouse with little for retirement. Some farmers may not have outside farm business revenue streams to support their retirement fund. In most cases, the farmers' main assets are farm business assets such as equipment and land. Therefore, financial preparation for retirement may not include the capital gains from purchased land or equipment (Eggers 2012).

Without succession planning, millions of acres in the hands of aging farmers could subsequently transfer to developers or high net-worth individuals not planning to use the land for agricultural purposes. The land use change does not come without costs. Farmland and ranchland play a role in society beyond feeding people. These lands can sequester carbon, provide habitat for wildlife and native species, protect water quality, and sustain rural community resilience. Suburban/rural sprawl and urbanization undermine food security, local food systems, and the environment (Hunter et al., 2022). Sprawl requires more dispersed populations, and more land and space for individuals to live, work, shop, and recreate. (Theobald 2003). These issues constitute the

primary theme of this portfolio representing my work in the Environmental Studies master's program.

Throughout my graduate studies, I have expanded my understanding of the food system, and where I can personally make a positive impact. The food industry, and who controls it, has been an interest of mine since I started immersing myself in farm work and the restaurant industry. I saw a clear distinction between the taste and quality of local, fresh produce when compared to the large distributor's products. When I worked my first farm job, I noticed small imperfections on vegetables and the lack of shininess on peppers and cucumbers. The tomatoes came in many shapes, colors, and sizes, bursting with flavor. Grocery store produce seemed so uniformed in comparison to the selection I was enriched by. My passion for land access and land transition sprang from my own experience renting farmland in a suburban town 15 minutes outside of a city in Maine. The town transitioned from pig and chicken farming to neighborhoods and community parks. An ideal place to raise a family next to the ocean and close to the city. As a young, aspiring farmer, I started renting "grandfathered" farmland land in this small town where large-scale farming was illegal. As I started my new farm business, I continuously faced financial and city permitting barriers such as town council concern for agricultural runoff into street water drains, surveying all agricultural used land and presenting plan to the city planning office, and the cost to renovate all farmstand and water areas up to city code. I unfortunately had to walk away from my start up farm, but this experience highlighted a larger issue at hand – adequate and affordable farmland access.

Patricia Allen (2004) states in *Together at the Table* that: "no other commodity is more essential than food" (22). Food, like water, is absolutely required for human survival, but food is not

always seen as an inherent right, and today, access to it can be determined by one's ability to pay for it. Food has a tremendous influence on humans, but the current American food system is influenced more by economics than health. Currently, America has one of the world's most productive agriculture food system, yet many Americans experience food insecurity. Americans are inevitably reliant on a mostly destructive food system concealed in technological innovations such as new developments in fertilizers, pesticides, and cultivation techniques that increase production (Allen 2004, p. 25). Even as land and labor used in American farming declined, innovations in animals and crop genetics, chemicals, equipment, and farm organization have enabled continuing growth in farm outputs (Njuki 2020). Environmental problems in today's agrifood system contribute to a variety of issues including severe pollution, environmental destruction, vanishing rural communities, health complications, poverty, blurring relationships between people and agriculture producers, and so on.

The last U.S. Agricultural Census (2017) showed that family farms make up 98% of the agricultural sector. The largest share of the U.S. agricultural land is owned by families and individuals (201.5 million acres of cropland and 223.8 million acres of pastureland). The remaining farmland is primarily owned by partnerships and family corporations with non-family corporations owning only 3.1 million acres of cropland and 6.4 million acres of pastureland (Savage 2022). Although most farmland is privately owned and operated, the agricultural market is highly concentrated. Today, just four large conglomerates control approximately 55-85% of the U.S. beef, pork, and poultry markets. These conglomerates absorb an increasing number of smaller processors each year. This consolidation squeezes the power from both consumers, and farmers and ranchers. While these four firms make more profit, consumers pay more, and producers earn less for their products (Deese, Fazili, and Ramamurti 2021). The economic

concentration of large agrichemical corporations is one threat to the future of America's food system.

Family farms are not guaranteed in the future as more aging producers seek retirement with little interest from the next generation and increasing barriers for young farmers entering the field. From 2010 to 2020, the U.S. Census data showed the population in rural (nonmetro) counties declined by 0.6 percent, the first decade of overall rural population decline, while metro areas grew by 8.8 percent during the same decade (Davis et al. 2022). Surviving and beginning family farms have the power to shift their techniques, practices, and markets by collaborating with fellow producers, regional consumers, and local government. Family farms are the backbone of America's economy because when family farms thrive, businesses thrive, and local communities thrive. The U.S. Department of Agriculture found that family farms "remain a key part of U.S. agriculture, making up 98% of all farms and providing 88% of production" (Whitt 2020).

Family farms and their environmental, social, and personal contributions to communities stimulate local economies by generating jobs and supporting local businesses in a circular market system. The farm family is connected to the land, having a personal and invested interest in the economic vitality, social well-being, and ecological health of their community.

Over the years, I have learned about alternative food systems that embody local and regional food resilience and focus on sustainable development. Allen (2004) defined sustainable development as "a strategy for improving the quality of life while preserving the environmental potential for the future, of living off interest rather than consuming natural capital [...] recognizing that economic and environmental goals are inextricably linked" (33). A shift to a local and regional food system seeks more self-reliance than self-sufficiency (Kloppenburger et al.

1996). A regional food system considers a landscape's certain needs and limitations such as: land use and protection, energy use, transportation efficiencies, productive system, and climate. A more community reliant shift can advance the ability of an area to work with the land and other sustainable resources to maintain and enhance farms and farm access, and to feed more of its residents (Clancy and Ruhf 2018). Current food system practices are being taken from future generations through increased soil erosion and resource depletion. Alternative practices focus on health: health of the environment, the individuals, the community.

The following portfolio is designed to help me better understand, and carefully examine, the influences changing the boundaries between rural and urban communities and community member livelihoods. I approach my inquiry about future farmers' land access and the future for United States farmland by identifying strategies used to transfer land from current farmers to farmland seekers. Specifically, my portfolio synthesizes my graduate research and experience with nonprofits in Montana that are diligently working towards a more resilient food system in urban and rural landscapes. I explore this topic by diving into the literature available on family farm succession planning.

As the current generation of farm and ranch owners retire, the continuity of their operations and land ownership depends on their decision to keep the land in agricultural production, and their ability to find a successor. The establishment of a successor to agricultural land and business ownership, and the development of a succession plan to assist this transition are essential to the process of passing a farm on to the next generation as smoothly and successfully as possible. Farm succession planning primarily entails the succession of the business and land to the next generation (Mishra, El-Osta, and Shaik 2010). Farm succession planning is complex with many

elements including a retirement plan, an estate plan, a management succession plan, and a business plan. How farmers and ranchers approach succession planning is varied and often complicated. Retiring can be a sensitive subject for many farmers and their families since the land is connected to their livelihoods and identities. In addition, succession planning requires time, effort, and in most cases vulnerability from all members of the family. By planning for their future, farmers can have reassurance for their retirement, their family, their business, and their land's future.

The future of farming relies on the transition from an older to a newer generation of producers. Beginning and existing farmers expanding production face many challenges accessing farmland with the following characteristics: availability, suitability, affordability, accessibility, land security, and equitability. The future of farming and food security depends on farmers being able to start and grow their farm operations. Land held by aging farmers, non-farming landowners, institutions, and public entities needs to be available, affordable, and secure for new and established farmers (Economic Research Service 2022).

### ***Portfolio Components***

The elements of this portfolio, described in detail below, are linked thematically; each aims to understand the graveness of farmland access and transition through facilitation, programming, and continual education.

- *Family Farm Succession Planning Literature Review:* The first element is a literature review about family farm succession planning. The literature review examines this process, as well as the drawbacks, barriers, and benefits to succession planning for farm and ranch businesses in the United States. This literature review addresses scholarly work examining the process

of on farm succession planning. The purpose of this literature review is to establish a comprehensive understanding of succession planning, and the many contexts within which it can be successful. Through my research, I identify what succession planning is, what is already known about the process, the benefits, and the obstacles. I provide a broad overview of the issues at stake for aging farmers and ranchers in the United States and then define, describe, and analyze farm succession planning. The literature addressing family farm succession planning is heavy. This topic is personal, emotional, and unique to each family farm situation. All the literature includes processes and steps to complete an in-depth plan, but in most cases, the process is not so straightforward. One of the biggest barriers to succession planning is the emotional difficulty of retiring from a livelihood heavily connected to the landscape. Another challenge is the ability for farm or ranch businesses to support a successor and the retiring farmer. Each family farm has their own hurdles to overcome in this process. I provide suggestions for more research in facilitation success in farm succession planning processes including facilitation between family members and their goals for the land. In addition, I suggest the need for more programs to help connect aging farmers with non-family successors to help keep more family farms viable and productive for years to come.

- *Internship with the Community Food and Agriculture Coalition:* The second element describes an internship I did with a nonprofit, the Community Food and Agriculture Coalition (CFAC), focusing on Montana’s farmland access, education, and resource outreach. CFAC is a nonprofit located in Missoula, MT “focused on building a vibrant future for Montana’s farmland, farmers, and food system” (Farm Link Montana 2023). During my internship with CFAC, I worked on their Farm Link Montana website. This website



represents one of CFAC's programs that tries to ensure farmland preservation and keep farming occupations viable. [Farmlinkmontana.org](https://farmlinkmontana.org) houses a database that lists available farmland, showcasing new farmers seeking land, networks, and farm work across Montana. The website is a great tool for new, current, and aging farmers looking for workshops, information, resources on securing land, business planning, financing, and planning for on-farm success. I primarily focused on gathering and analyzing user feedback on CFAC's tools, resources, and databases that are available to landowners, agriculture producers, and land seekers. Based on the users' feedback, I created a leasing guide that helps facilitate necessary conversations between landowners and potential land lessees. Young aspiring farmers face many obstacles today including land access and land affordability, which prevents young farmers from securing land. Land access is the way farmers and ranchers acquire land to support their operations. This involves land seekers, landowners, real estate agents, service providers, and community members. This component includes a reflective piece describing my challenges, successes, and what I gained from my work at CFAC. This reflective piece includes details about the projects I accomplished during my internship at CFAC and their deliverables.

- *One Montana's Landowner Education and Resource Network Research Report:* The final element is a report written in collaboration with One Montana's Landowner Education and Resource Network (L.E.A.R.N.) project. One Montana is a nonprofit working with stakeholders to strengthen communities by addressing economic, social, and environmental challenges through collaboration, partnership, and applicable research. The L.E.A.R.N. research was conducted in Summer 2022 with another graduate student. The purpose of this project was to compile relevant information on successful succession planning tools and

resources for farmers and ranchers. I interviewed individuals from nonprofits, land trusts, government agencies, and other stakeholders in agricultural settings to address the many ways they tackle succession planning in ranching and farming networks.

The report covers the projects' purpose and hypotheses, research method for finding interviewees and how interviews were conducted, as well as my findings, which is the need for an aggregated platform with accessible resources for different stakeholders (farmers, ranchers, organizations, and hard skill professionals). I suggest a collaborative conference as a next step for the project that would bring stakeholders together working on farmland succession to answer critical questions on how to make succession planning more accessible and successful. Therefore, the project with One Montana is ongoing and could lead to additional research and collaboration among Montana and national organizations. One Montana published this report.

Further explanation and discussion of each of these three portfolio components is included in the following documents along with supporting materials. The conclusion ties together themes with each of these elements and offers reflections on the cumulative experience of undertaking these projects.

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## *II. Family Farm Succession Planning Literature Review*



# KEEP WORKING HANDS ON WORKING LAND

Strategies for Effective Farmland Transitions, Succession Planning, and

Landowner Education

Elyse Caiazzo

December 16, 2022

## Introduction

The purpose of this review is to pull from a wide variety of academic literature to understand how family farms create a succession plan for their business and the barriers they may face through this process. The next generation of farmers in the United States face many obstacles as the transition process of farms and ranches from an aging generation become more complicated and challenging. For the past century, the total number of farms have steadily declined from 2.2 million in 2007 to just over two million farms in 2021, . The age of primary producers is steadily increasing as fewer young individuals are entering the agricultural industry (USDA, 2022). The average age of American farmers is 59 years old, compared with 45 years old in 1974 and 39 years old in 1945 (Pitcoff 2013; National Agricultural Statistics Service 2019a). It is estimated that between 2010 and 2030, half a million of American farmers will retire (Shute 2011) and young farmers make up only 14 percent of farmers and ranchers ([National Agricultural Statistic Service](#) 2019). American agricultural lands are at risk as less family farms transition their land and business to the next generation of farmers.

The United States Department of Agriculture (USDA) National Institute of Food and Agriculture defines family farms as “any farm organized as a sole proprietorship, partnership, or family corporation” (USDA 2022). Based on this definition, 98 percent of farms in the U.S. in 2021 were family farms (Economic Research Service 2022). According to the Economic Research Service (ERS), the definition of family farms has changed over time. Historically, it was common for a family to provide all the labor for a farm and to own all of the farm’s land and capital. Today, this notion varies across farms as individual farms hire nonfamily labor, rent land or other capital, or contract for various farm services. The current ERS definition of family farms are “any farm in which the majority of the business is owned by an operator and any individuals

related to them by blood, marriage, or adoption, including relatives who do not live in the operator's household" (United States Department of Agriculture, Economic Research Service 2022)

In the past, the notion "keeping the farm in the family" was taken literally as family farms continued for generations (Lobley and Baker 2012, 9). This notion included legal assets and managerial control of operations transitioned to an intergenerational successor, all the while keeping the family's self-defining sense of place on the farm (Lobley and Baker 2012, 9; Goeller 2012, 150). Senior farmers often look to their own families to continue their farm business as they think about transitioning out of farming. A senior farm operator is the operator who makes most of the day-to-day management decisions (Mishra, El-Osta, and Shaik 2010, 140), and heirs are successors who inherit, or are expected to inherit assets (Carter n.d.). Even if farmers have heirs interested in continuing the operation, the transition is not as simple as handing over assets and giving them the keys to the tractor. The transfer of farms from one generation of a family to the next is becoming less common. Reasons for fewer in-family farm transfers could be from lack of interest in operations from heirs, lack of land's financial ability to support additional families, and lack of control or managerial responsibility for younger generations (Pitcoff 2013). Therefore, more land congregates in fewer hands as exiting farmers have fewer options for transitioning their businesses.

As land congregates into bigger operations, America loses family farms and ranches and with that, thriving rural communities (Center for Rural Affairs 2022; Goeller 2012). The recent U.S. Census and further research showed signs of decline in rural populations reflecting shifting demographics and signals continued labor shortages across the nations farming and ranching regions. According to USDA data, hired workers dropped 11% in April 2021, even as wages



rates increased 6% from the previous year. The CEO of Farmer Focus claims “the consolidation of the farming industry is accelerating the decline of rural populations and making farming less attractive to younger generations” (Garwood 2021). This review will address these concerns and other obstacles farmers and their families face when deciding the future of the farm.

Family farm transitions are not as simple as they used to be because farmers cannot always depend on familial successor to continue operations. In family farming, the cultural “script” has historically been heavily gendered and strongly linked to the ways in which farm labor is organized. Research recognizes the eldest boy in a farm family naturally, without questioning other heirs about their involvement on the farm. Once a person has been identified as the successor, extensive exposure to farm work at an early age plays a significant role in affirming the successor’s identity (Chiswell and Lobley 2018). Today, who, when, or if a successor takes over the farm are the subjects to a variety of drivers. For many years, multidisciplinary scholarship addressing succession planning on family farms has primarily focused on the transition of managerial control and inheritance of assets of the business to the successor. If there are no children, or no children show interest in the business, then the owners must search for off-farm successors if they wish for the farm to continue, and the land to remain in agriculture. Ideally, this process requires that they develop and follow a succession plan. If no successor is found, the farmer should write an estate plan, an inheritance plan, and liquidate farm assets. The focus of this literature review centers on family farms that have a willing successor to take over operations. Furthermore, the literature in this review primarily focuses on addressing the complex process of succession planning relating to the current context of family farms in the 21<sup>st</sup> century.

This review will first define farm succession planning and the significance of succession planning for the future of family farming in the United States. Then, I discuss the many strategies for creating a successful succession plan. Though the process can be extensive, I primarily focus on the emotional aspect of the process. In the following section, I highlight the many barriers to family farm succession planning. Finally, I examine the role public agencies and federal assistance can play in facilitating conversations and alleviating stress on the farms that feed this country. Through this review, my goal is to gain a broader knowledge of this topic by synthesizing a wide variety of scholarly work and organizations efforts to address the particularly sensitive subject of land transitions.

This review focuses on family farm succession planning in the United States. There is a large amount of literature written about farm succession planning in Europe, Australia, and the Global South. However, I do not address literature from other parts of the world. This is due to the complex situation around land access, tenure, and transfers and the political, social, and economic context of the United States agricultural system. This review focuses on literature published between the 1990's (when most agricultural land in the U.S. was purchased from a non-relative (Valliant et al. 2019)) and December 2022. I first examine the peer-reviewed literature including books (e.g., Lobley et al. 2012) and articles on family farms, farm succession, and land transitions. Most articles were published in business, economics, and sociology journals (*International Food and Agribusiness Management Review*, *Western Agricultural Economics Association*, *Rural Sociology*). I also draw from organizations' work involved in farm succession planning, estate planning, farm transfers and facilitation (e.g., Land for Good, National Young Farmers Coalition).

## **Montana Farm Demographics**

Land is changing hands – some land may transition to rural residential, and some land may stay in working hands. Montana ranks first in the nation in production of lentils and certified organic wheat, and ranks second in spring wheat, durum wheat, barley, flaxseed, and safflower. Cattle and wheat remain Montana’s largest commodities, and together account for three-fourths of the state’s agricultural income. Agriculture has lured many individuals to Montana and remains to be the state’s number one industry (NASDA, 2023). In the 2021 State Agriculture Overview, Montana had 57,900,000 acres in farm operations with over 27,000 farms (NASS, 2023). According to the Census Bureau (2020), the majority of Montana’s geographic area is defined as rural, meaning most population centers have fewer than 2,500 people (Montana State Legislature 2020). The average age of producers in Montana is 58.2 years old (NASS, 2019b). Figure 1 shows that as farm acres increase so does the average age of producers. Surprisingly, the average age decreases as farm sizes increase over 1000 acres. Thirty percent of all producers in the state operate farms over 1000 acres (NASS, 2019b). The 2017 agriculture census shows that these large-scale producers are primarily in their mid-50’s to late 70s. Twenty one percent of all producers are over the age of 55 years old and farming on over 1000 acres (NASS, 2019b). Meanwhile, only eight percent of all producers are under the age of 34 years old (NASS, 2019b). The graduation of farm owners and operators is not being replaced at the same rate with young farmers and ranchers taking over operations.

Figure 1. The Average age of Producers based on the size of farms (acres) in Montana (National Agriculture Statistics Service 2019b) and United States (National Agriculture Statistics Service 2019d)

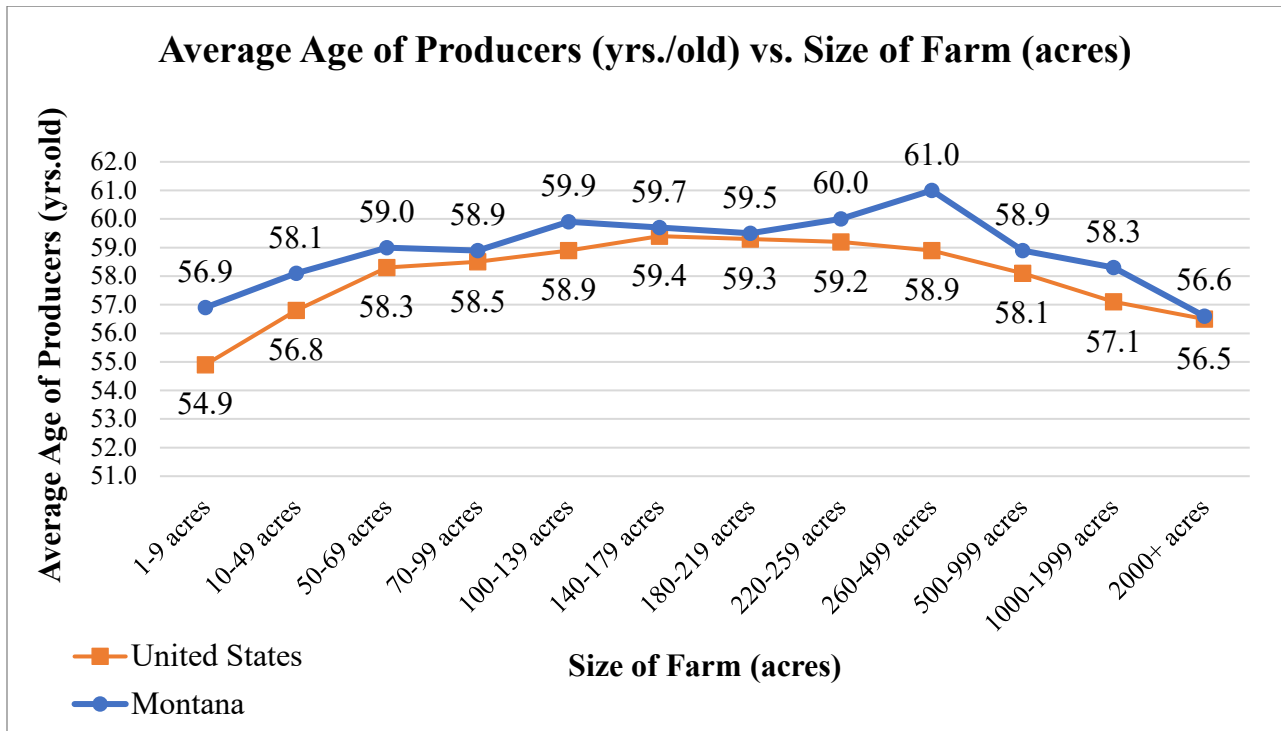


Figure 2 shows farm producers selling less than \$1000 dollars have an average age of 61 years old. This could be from an older generation living on farmland practicing subsistence farming, not primarily selling the products grown on the land. Thirty percent of all producers are also generating less than \$2,500 in income (NASS, 2019c). In these instances, it is likely that this is a rural residence farm and not an active commercial farm. This land is potentially at risk because the farmland operation is primarily subsistence farming and not a profitable business. Successors of the farm may not be inclined to move back and advance operations, and farmers seeking land may not be able to afford such parcels of farmland without generating business income from the land. According to the Economic Research Service, a farm is “defined as any place from which \$1,000 or more of agricultural products were produced and sold, or normally would have been sold, during the year” (Economic Research Service, 2022). Family farm succession planning is

not directed to these individuals and subsistence farms. Succession planning is important for operations with economic viability to communities and to the state. Both the United States and Montana are experiencing similar aging trends based on market value of agricultural products sold. Montana has an older age of producers compared to the United States average age (Figure 3). This could be due to 62% of Montana’s land is in agricultural production with 40% of Montana farms over 500 acres in size (NASS2019b). For farms making over a million dollars, 59% of those producers in Montana are over the age of 55 years old (NASS 2019c). These farms are large scale operations with thousands of acres. For farms grossing between \$50,000 to \$250,000 dollars, about 60 percent of those producers are over the age of 50 years old, and around 10 percent of the same producers are under the age of 35 years old (NASS 2019c).

Figure 2. Average of producers based on market value of agricultural products sold in Montana (National Agriculture Statistics Service 2019c)

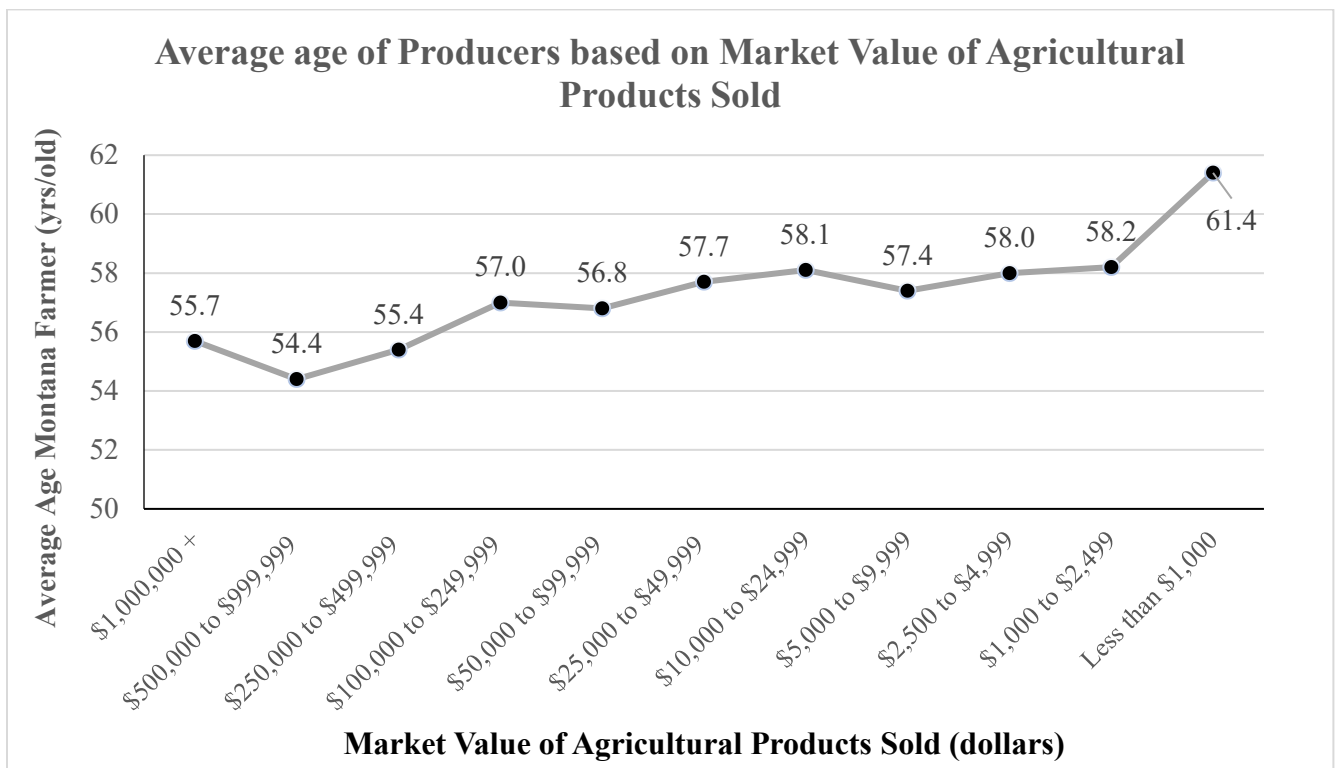
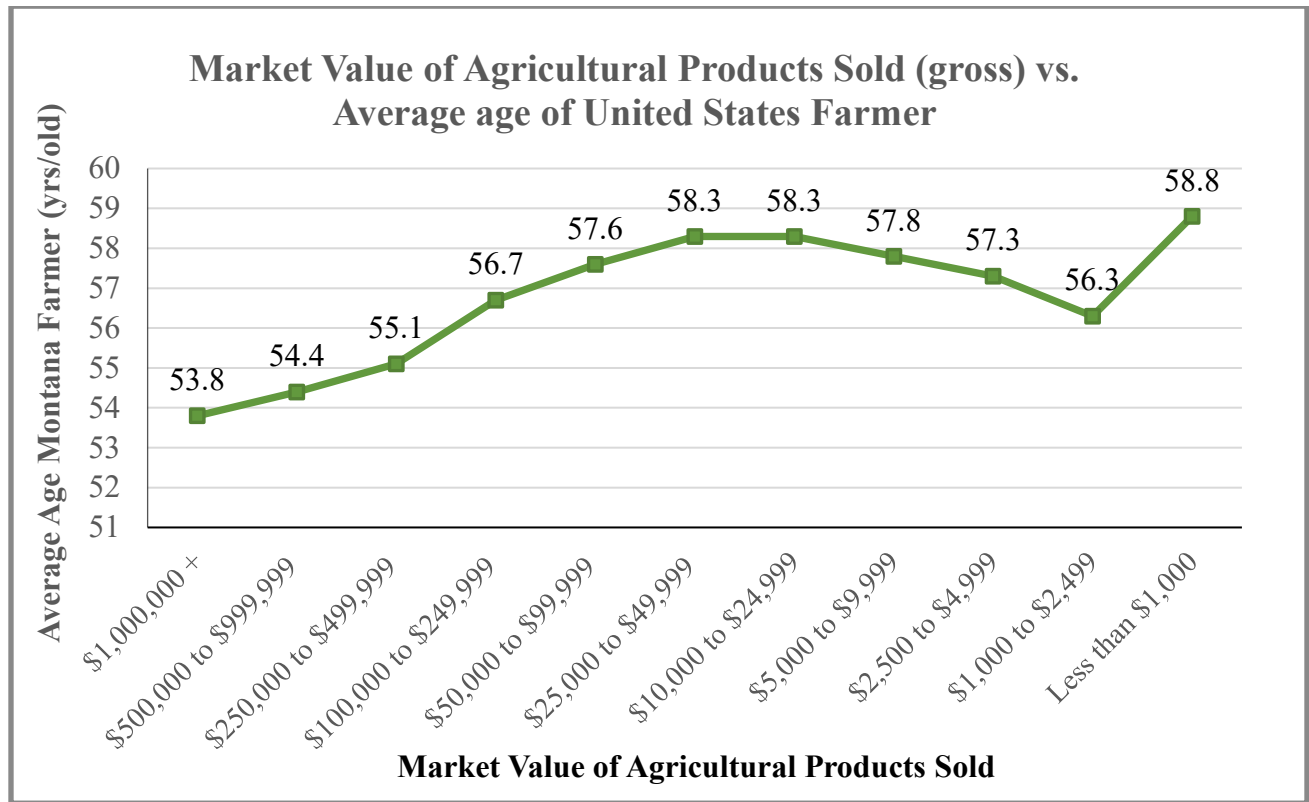


Figure 3. Average of producers based on market value of agricultural products sold in the United States (National Agriculture Statistics Service 2019e)



## Defining Farm Succession Planning

The definition of farm succession planning is complex. Succession planning pertains to the retirement of the senior farmer, considering all the needs of the business, the owner, and the family (Moss Adams LLP 2012, 1). Succession plans constitute broader, extensive documents with many elements including a retirement plan, an estate plan, a management succession plan or action plan, and a business plan. Most of the literature for succession planning provides steps and strategies for families to follow, and factors to consider as they think about the farm’s future (Ruhf 2012; Betts 2015; Wenger 2015; O’Rourke 2017; Lobley and Baker 2012; Moss Adams LLP 2012). Succession planning primarily entails the continuation of the occupation and land to the next generation. Succession plans specify when, how, and under what circumstances

management of the business will pass from the senior farmers to another individual. These plans serve as a road map for managing a business as households enter the retirement or transfer stages of a family life cycle or unexpected circumstances, such as incapacitation, illness, or death (Mishra, El-Osta, and Shaik 2010,149). One definition from Betts (2015) is: “a continuous process to plan for the transfer of knowledge, skills, labor, management, control and ownership of the farm between one generation, sometimes known as the founder or retiring generation, and the next generation.” This definition calls attention to the many elements that need to be addressed in the process and the different players at the table; hence, this definition implies the next generation may not just be one successor or one individual. In a family farm, there could be multiple heirs and potentially one or two heirs who want to continue the business and keep the land in agriculture. Still, other heirs often must be included in aspects of succession planning, especially the estate plan and inheritance plan.

The objectives of succession planning are to maintain a viable farm business for the next generation, to treat all children fairly and equitably, and to provide one’s own retirement (Whitehead, Loble, and Baker 2012, 224). Keeping a viable farm business requires the owner to consider the entire business life cycle, not simply to start planning at the end of their career, but within a 10-to-15-year range before they plan to retire. This age usually falls around 45 to 50 years old. Ideally, the next generation would be 25 to 30 years old (Leach 2012, 201). The business life cycle often entails an initial shortage of capital and profits matched with an abundance of labor, but over time, the business builds capital and better labor management. When the owner starts taking out capital for retirement and reducing labor contributions, bringing in a new person can restart the business cycle before it peaks or begins to decline (Leibold 2014, 2). Loble and Baker (2012) define intergenerational succession as “the process,

stretching over a period of time, of transferring managerial control and other tangible assets such as farm specific knowledge” (2). This definition is similar to Betts (2015) definition above, as it calls for a transfer of assets which includes physical, social, economic, and intellectual assets that are critical for farm business viability.

Dave Goeller (2012) refers to the overall succession plan as a three-legged stool – “the three key elements need to be interdependent, so they complement each other rather than conflict” (151). The three legs are a retirement plan, an estate plan, and a business plan. This three-legged stool is further supported by a team of professionals: transfer advisors, business advisors, attorneys, accountants, appraisers, lenders, facilitators, and counselors. Each member of the team can provide expertise in establishing a plan that will work for the family, but a professional team can be costly. However, organizations and state agencies across the country recognize this financial burden and work through federal grants to provide free professional help to retiring farmers (Ghia 2023). Retirement is often a gradual withdrawal from physical labor and managerial control by the older generation (Lobley and Baker 2012, 2). Retirement planning is essential to developing a sustainable family farm, but it has the hardest questions for senior farmers to answer: when to stop working, where to live, what to do, and how to fund post farm life with equity from the business (Kirkpatrick 2012, 166). Retirement can mean different things for different farmers. It could mean an absolute end to association with the operation (fully retired), a step away from labor and managerial control (semi-retired) or maintaining full managerial control and provide some labor (not retired) (Kirkpatrick 2012; Whitehead, Lobley and Baker 2012). Many farmers do not view farming as a career or a business, but as a way of life. This aspect of succession planning can be the most challenging and emotional, as senior farmers hold onto the mentality of “dying with your boots on” (Kirkpatrick 2012, 174).



Retirement planning and the emotional struggles behind the process can be seen as a barrier to succession planning on family farms.

When starting the process, the first question a senior farmer should ask themselves is: “do you want your farm business to continue beyond your lifetime?” (Goeller 2012, 152). If the answer is no, then the farmer should find a lawyer and have an estate plan drawn up. If the answer is yes, then the next question is who will be the successor to the business? According to Marsha Geotting (2022), estate planning is “the process of arranging one’s affairs to meet their objectives regarding the use, conservation, and distribution of the property.” The estate plan should reflect the goals for the farm’s future and for the potential successor’s future. This element requires the most amount of communication with the family as each member might have different goals for the property. An estate plan directly transfers assets upon death while also helping reduce estate tax burden through predeath provisions such as gifting (Moss Adam LLP 2012; Ruhf 2012). Estate plans are unique and specialized for every family’s needs and protection. It can also be one of the most difficult decisions to make regarding asset distributions, as assets should be distributed fairly, not equally, considering on farm and off farm heirs. This concept is “contribution should equal compensation” (Goeller 2012, 154). Goeller (2012) and Leibold (2014) both stress the importance of fair compensation to the identified successor who directly contributes to the business through labor and skills. When distributing assets, senior farmers should carefully leave non-farming heirs non-farm assets to avoid jeopardizing the continuation of the farming business. If not planned properly, the farm successor may be financially burdened with buying out their siblings for farm assets because of equal distribution (Goeller 2012, 155). If non-farming heirs expect their “fair share” and later decide to liquidate their farm business assets, the farm business heir may need to work off farm labor to buy the

assets from the non-farming heirs. Such time and money could adversely affect the ability of the farm to acquire new equipment, technology, or add new enterprises (Baker 2012, 143). If possible, it may be better to provide an inheritance for non-farming heirs from assets that are not crucial to the continuation of the farm business such as houses, stocks, bonds, life insurance, non-farm investments if applicable (Goeller 2012, 155).

The transfer of management and ownership of the farm business mirrors the estate plan and the retirement plan. The operational transfer plan lays out how management tasks, responsibilities, and income shift over time from one farm operator to another (Ruhf 2012, 10). Transitioning a farm business from one generation to the next is more than transferring ownership of farm assets. A timeline should be established with the retirement plan on when the senior farmer would be phased out of operations. Most literature about management transfer plans views the new role of the senior farmer in retirement phase as somewhere between no involvement and slowing down (Leibold 2014; Goeller 2012; Ruhf 2012). Pitcoff 2013 quotes Kathy Ruhf, the Executive Director of Land for Good, saying “gradual transfers are almost always better than an all-at-once change in ownership.” Gradual transfers involve training, passing on skills and knowledge the owner has acquired over time and the know-how to manage a successful business (Moss Adams LLP 2012; Goeller 2012; Leibold 2014). This all boils down to communication. All literature in this review stresses the importance of communication. The expectations of each generation should be clear prior to implementation and should consider work schedule, workload, vacation time, and salary (Kirkpatrick 2012; Goeller 2012).

Lastly, a business plan, including a financing plan, will determine the viability of the farm’s future. Studies show a link between the lack of an identified successor and a farm’s trajectory of disinvestment and decline (Inwoods and Sharp 2012). Inwood and Sharp (2012)

recognize that a present and identified successor affects the development and adaptation of the farms enterprises by expanding through either horizontal or vertical growth (112). Bringing on a successor means the business needs to financially meet the needs of both the senior farmers' family and the successor's family. To support additional family members, the farm business must "face economic constraints and reinforce decisions on growth strategies" (Inwood and Sharp 2012, 112). Horizontal growth is a growth strategy through land accumulation, which is more common in large, commodity farms (Inwood and Sharp 2012,112). Vertical growth is an intensification strategy either increasing production or shifting into higher value crops or finding new profitable on farm revenues such as agrotourism (Inwood and Sharp 2012, 113).

## **Why is Succession Planning on Family Farms Important?**

The value of succession planning is evident in the United States, where the market heavily pressures and awards the conversion of agricultural land to residential and commercial uses (Pitcoff 2013). Over time, this means a loss in the number of farms regionally, which may diminish access to fresh, locally grown food. Some efforts from land trusts and organizations across the country aim to protect farmland from development through conservation easements and other tools (Schwartz et al. 2013). However, another new looming threat to farmland operation continuity is high net worth buyers purchasing land (Lee 2021). These threats only become apparent when a senior farmer decides to sell their land because of lack of successor, lack of plan, or lack of retirement funds.

Many scholars stress the importance of succession planning as a crucial part of family business continuity and enterprise growth (Edobor, Wiatt, and Marshall 2021; Whitehead, Lobley, and Baker 2012; Inwood and Sharp 2012; Lobley and Baker 2012). John Baker (2012) writes about the succession effect, where the "owner-operator decides to have a successor and

begins the process of increasing income of the farm to support a second generation” (144). On farms that could not identify a successor, the business entered a static state where farmers did not pursue any growth or development strategies. Scholars have established a clear link between the lack of a successor and farm trajectory of disinvestment and decline (Inwood and Sharp 2012, 112; Lobley, Baker and Whitehead 2012; Edobor, Wiatt, and Marshall 2021). By starting the process of succession planning, farmers can determine whether they want the business to continue after death. Farmers often spend their entire life performing day-to-day tasks for 50 years, planning for the next season but neglecting the process of planning for a successor, or training one for a later age. Failure to plan for retirement, management, and estate transfers can result in serious problems such as financial insecurity, personal and family dissatisfaction, and unanticipated capital losses (Mishra, El-Osta, and Shaik 2010, 133). Lobley (2012) argues that “sustaining family farms contributes to the broader sustainability of rural communities” (10). Decisions made about the management of family farms have implications for rural economies, rural communities, and the environment (Lobley and Baker 2012, 12).

## **What Does the Process entail?**

The literature emphasizes that “succession planning is not an event but a process” (Lobley, Baker and Whitehead 2012; Inwood and Sharp 2012; Pitcoff 2013; Coughler 2015) In this research, I am taking into consideration the fact that succession planning is driven by keeping the land in agricultural operation. In a previous section, I examined the three elements, or “three-legged stool” of succession planning. Those elements fit within the many steps of the overall process of succession planning. As itemized by scholars (Mishra, El-Osta, and Shaik 2010, 140; Moss Adams LLP 2012; Ruhf 2012; Goeller 2012; Betts 2015; Wenger 2015), succession planning in the United States consists of five steps. First, a strategic plan will describe

the business and personal goals and expectations of the retiring and the next generation in both the short and long term. This could include an action plan that provides a list of all key activities to implement in the overall plan and a timeline. Second, an operational transition plan describes how the transfer of management, control, and labor will take place. Third, a financial plan describes how the farm business will meet the needs of both the retirees and the successors, personally and operationally. Fourth, a retirement plan deals with lifestyle considerations and financial components describing where the money will come from and how the money will be spent. Lastly, estate planning is used to minimize estate taxes and transfer obligations while planning for equitable distribution. It is important to note that these steps are not necessarily in sequence or set order. Some parts must be done sequentially, and others can be done concurrently (Wenger 2015). It takes time and effort to accomplish each step, making it critical that the process starts earlier in life for the senior farmer. The plan can be changed overtime as family dynamics change. But starting a line of communication is the biggest hurdle (Goetting 2012). Regular family meetings can help answer the many questions to follow, and members more involved in the discussion are more likely to buy into the plan (Zoller 2007).

Many scholars who discuss succession planning include a preliminary step that opens the line of communication; defines personal, family, and business goals and objectives; and identifies each person's role and involvement in business (Wenger 2015). Based on the literature, I believe this preliminary step is the most important step to the whole process. Pitcoff (2013) quotes Kathy Ruhf stating, "the hard issues are the soft issues." Hard issues pertain to business, financial, legal, taxes, estate, retirement funds, and management control. The soft issues relate to family matters such as legacy, communication, vision, goals, fairness, identity, and management control. Setting goals as a family, clarifying values, and communicating well are all critical to a

successful planning transition (Ghia 2023; Pitcoff 2013). Before a family and possibly others involved start a conversation, each member needs to establish their own goals and priorities for the farm. These individual goals and priorities should be flexible when negotiating as family (Ruhf 2012, 2). During a kitchen table discussion, some topics are sometimes more difficult for families to talk about openly. These topics include naming and assigning assets and wealth; and defining the roles and expectations of non-farming family members other than the business successors. Additionally, old age and death, letting go of control, future management, careers, ensuring that everyone is heard, and other unforeseen circumstances can make the process challenging (Ruhf 2012, Goeller 2012). Inwood and Sharp (2011) pay attention to the “internal household dynamics that can include difficult negotiation between spouses, children, and extended kin regarding the farm’s development and various family and individual goals” (109). Therefore, communication is an indispensable skill for farm business succession planning. Every aspect of farm succession planning requires that everyone involved be able to communicate effectively. It requires more listening than talking (Baker 2012,134).

The point of the preliminary step is to answer questions, create a vision statement, and open communication. Farm succession is so much more than finalizing agreements and distributing assets – it’s about keeping farming dreams alive (Torgerson 2022). The results from the preliminary step will work their way into many other steps such as the strategic plan. The strategic plan should first have a statement of intent that combines the vision statement and the description of the future that is desired. This will help to motivate all involved to work to achieve the perceived future (Baker 2012, 139). One must define the goals of each member of the family, personal and business, if applicable, and lay out the strategies for how the business will meet these goals. Goals are the guides to decisions (Moss Adams 2012, 5). Lastly, one must develop a

critical path method, which identifies and prioritizes the activities necessary to complete the plan. The key activities need to be prioritized with deadlines to help monitor and measure progress (Betts 2015).

Some components of operational transfer plans were discussed in the defining succession planning section of this paper. One key component to this plan is the training and development plan for the successor. Scholars like Edobor, Wiatt, and Marshall (2021) found a positive correlation between transfer readiness and capital, experience, and delegation of control from the senior farmers to the next successor (932). The process of developing a successor requires many hours of discussion between the two generations, talking through expectations, and deliberating whether the heirs want to continue the business, look for a non-heir successor, or sell the land. A gradual transition is a smoother process, allowing generation overlap and teaching. It allows the senior farmers to hand down skills, starting years before managerial control is fully transferred to the new owner (Pitcoff 2013). Goeller (2012) lists 12 questions for each party to fill out personally concerning the farm business succession process (156). For example, what time does the workday begin and end? How long will the transition period last? Will there be vacation? Lifestyle expectations could be significantly different between generations. Once all questions are answered, negotiated, and agreed upon, the four phases of transition can be initiated starting with the testing phase, the commitment phase, the established phase, and the withdrawal phase. By the end of the transition, management of the business should be completely transferred to the successor, key business relationships transitioned, and ownership of assets that are planned to pass during the lifetime of the senior farmer should be well underway (Moss Adams LLP 2012, 4; Goeller 2012, 156-161).

A financial plan involves the financial viability of the business to support the preferred salaries of two working generations. Within the preliminary phase, a farm financial analysis should be completed to determine if the business is profitable and sustainable. If not, necessary changes need to be identified to be made in the future. It should be determined if the business currently generates enough profit to support another household, and factor in additional family living costs to support another family (Wenger 2015). The successor can determine whether to contribute to capital growth through horizontal or vertical adaptations (Inwood and Sharp 2012). The successor brings more than labor to the ongoing business. Successors identified are often encouraged to get off-farm experience and an education in order to provide alternatives for employment and or create other professional avenues on the farm (Whitehead, Lobley, and Baker 2012, 228; Inwood and Sharp 2012). The off-farm experience could bring new ideas and skill sets that are currently lacking in the business such as fair compensation and industry techniques (Leibold 2014, 2). The idea of “someday this will all be yours” or “if you stick it out during the tough times, I’ll take care of you someday” should be shifted towards compensating the successor as they take on more responsibility and labor perhaps through financial equity in the business (Leibold 2014, 2). It is important to discuss a time frame indicating levels of reduction of labor and control. As labor and management control transitions, fair compensation and income should be adjusted as the senior farmer draws closer to retirement (Pitcoff 2013; Leibold 2014).

Retirement requires a mental withdrawal from the business as much as a physical withdrawal (Whitehead et al. 2012, 220). The complexity of succession planning comes with trying to figure out the unknown. Farm families, especially the senior farmers and spouses must answer questions they may not have previously considered. For instance, exiting farmers typically need to cut emotional ties with the business. They should consider how to establish a



lifestyle beyond their livelihood, which is likely part of their identity. Kirkpatrick (2012) calls this a retirement fantasy (175). The retirement fantasy activity asks participants to imagine and draw what retirement might ideally entail if there were no financial restrictions. In most cases, older generations draw a more relaxed version of their current work life (Kirkpatrick 2012, 175). The older generation, unwilling to discuss mortality, retirement, and their life beyond the farm, can stall the process. Recognizing long-term goals and adhering to retirement income needs may help provide a healthy space for communication and assistance for the older generation. In a family business, as the senior farmer slowly relinquishes control, the successor should be taking a greater financial stake in the business. Therefore, senior farmers need to secure a source of income that is separate from the family farm. Retirees should consider stepping down at a time where they can still provide guidance for the next generation and be prepared for their new life (Leach 2012, 199).

Estate planning involves an inventory of all tangible and intangible assets such as equipment, livestock, stock or other ownership interest in the business, a potential separate farm business, non-farm business such as off-farm income, capital assets such as land and residence, and savings (Ruhf 2012, 3). The transfer of assets is impacted by the type of business structure. In a succession guide created by Land for Good (Ruhf 2012), the many methods of transferring assets to a business successor are listed (11-12). Different transfer methods will impact taxes and the transition of income between the two generations. In addition to transferring property and other assets, an estate plan should deal with decision making around legal and health concerns. To protect assets such as the farm from being used to pay for retirement, the aging generation should transfer farm assets to successor in a timely manner (Ruhf 2012, 13). As discussed in a previous section, scholars stress the importance of a fair and equitable estate plan, considering on

farm and off farm heirs, and their contribution to the business. Where the retirement income comes from can be determined by the financial approach to transitioning the assets. Will the successor pay a small fee to acquire the assets? Did the farmers and spouse put aside savings or invest? These complications involve a financial advisor to help navigate retirement expectations.

All steps include the family and an advisory team, including a facilitator, an accountant, a lawyer, a business advisor, and a financial planner. Some examples of facilitators in a rural community could be a county extension agent, a private consulting company, or a lawyer who works specifically within the agriculture community. This process can be expensive in many ways considering time and professional advice. However, this process can be financially factored into the plan, and could be the solution to keeping family farms in the hands of farm workers.

## **Barriers to Succession Planning**

Barriers to succession planning encompass the owner's emotional connection to their land and business. Many farmers view farming not only as a career or business, but as a way of life (Kirkpatrick 2012, 175). Farmer's lives revolve around the next year of production and investing in off farm inputs to get them through the next growing season. So, when 50 years go by, and they forget to factor in their life after farming, it can be daunting to take on. In most cases, the lack of a succession plan is not due to ignorance and more because of emotional barriers (Goeller 2012, Kirkpatrick 2012, Leach 2012). Emotional barriers could be fear of mortality, loss of identity, inability to choose among children, spouse's resistance to change, and pride of ownership. Leach (2012) perceives the "failure to address succession is often put down to a combination of the owner's distinctive desire to keep control of their creation, as well as a natural aversion to planning with reasons, often rationalizations deigned to avoid deep-rooted anxieties and fear" (225). The inability to recognize, analyze, and discuss the emotional aspects

of retirement and succession can stall the process. Given the importance of communication in the process of succession, if the senior farmer is not open and honest, it can be problematic. Pitts et al. (2009) identifies “the tension between openness and closedness within farm family planning and succession as farmers recognize the value of communicating openly with agents and advisors, yet feel it is inappropriate to discuss certain personal elements with family members” (63).

The notion of “emotional ownership is the idea that the business is, in some sense, part of who you are as a person” (Lobley and Baker 2012, 9). The loss of the control element is the giving up of control and knowing that someone else will have a say over what was once theirs (Kirkpatrick 2012,174). This notion ties with the attitude that “no one can do it as well as I can,” making farmers unwilling to plan for retirement, think about retiring, or planning for a successor. The rise of industrial farming technology such as large harvesters, tractors, seeders, and sprayers, allows aging farmers to stay in management until their older years due to decrease in manual labor. This prevents successors from taking the farm on at a younger age, thus discouraging the next generation from pursuing a farming career in the family (Lobley et al. 2012).

Pitts et al. (2009) suggest that “families might face internal difficulties (e.g., strained relationships) or external constraints (e.g., economic hardship) that limits the ability to prepare for the transfer of the farm” (61). Internal difficulties could be a strained family dynamic or differing views on how to run the farm, perception of unfair treatment, the lack of a successor, or simply ceasing control as a reminder of mortality (Pitts et al. 2009, 61). External constraints could be the limited financial resources to uphold the expected household wealth (Mishra, El-Osta, and Shaik 2010, 149), low profit margins, and the inability to sustain multiple households (Kirkpatrick 2012, 176). Succession planning is a time of great uncertainty which can be

beneficial as families experience pulls between continuity versus adaptability, and tradition versus modernity (Pitts et al. 2009, 63). The list of barriers to succession planning are almost always situational and unique to each family (Leibold 2014, 4). Obstacles could be communication, untimely death or illness, or a period of low profits.

## **Suggestions for Future Research**

There were fundamental gaps in the literature. Most of the literature referred to large scale agriculture or monocultural family farms in the United States. However, smaller family farms play a large role in benefiting the community, the wildlife, and the landscape. Whitehead et al. (2012) offers justification by stating that the smaller farms there are, the larger will be the rural population and the more efficient the use of social capital and rural infrastructure” (230). He goes on to state that: “smaller farms are less likely to produce monocultural patterns of farming and more likely to produce a varied and aesthetically pleasing landscape with less environmental pollution” (230). There is a need in the literature to describe how to successfully succeed smaller family farms to the next generation – thinking about how to diversify the operation to support more than one family. As discussed above, a large barrier to family farm succession is the businesses’ ability to support an additional family, and smaller family farms cannot always diversify the business by accumulating more land. In addition, more scholars should research and publish empirical work about actual experiences of stories from the process of succession. Research shows that other farmers are one of the best human resources (Ghia 2023). The podcast produced by Megan Torgerson called Reframing Rural is a prime example of using experiences as evidence for the complexity of succession planning (Torgerson 2022).

Most of the literature expressed a need for “governmental programs to play a role in facilitating or encouraging succession planning” (Pitcoff 2013). Facilitators can help farmers

consider and address issues they might not otherwise think about and can connect farmers with professionals who can help (Pitcoff 2013). Valliant et al. (2019) presents strategies that address such issues. Matching services do exist in the United States and have been somewhat successful. States such as Vermont, Maine, Massachusetts, Montana, and more have created a site to help farm seekers and farm property owners to connect for free via farmer profiles and classified property listings. In most cases, this site links to other agricultural support services (Vermont Land Link 2023). Another strategy to matchmaking could be in-person mixer events within a geographical area as an informal networking function, or a fully funded suite of succession planning assistance services. These services should ideally be available to all farm owners (Pitcoff 2013). Valliant et al. (2019) suggest that the “land grant extension system be a funding line for farm transfer facilitators” (86). The process of succession planning as stated above is extremely emotional and a long process that can be hard to carry out over a 10- or 15-year period. Facilitation can be a great resource to keep the family on track during the development of the planning document. Farmers dedicating themselves to a career that feeds the community and, in some instances, feeds vast communities nationally, retirement can be a daunting subject, with little money to spare for their retirement funds. Farmers with known successors are more likely to continue investment in the business than are farmers with no successor. By starting the succession plan at an earlier age, the owner can identify if they have heirs wanting to take on the business. If not, they can search beyond their heirs for employees and neighbors as successors to their operation. Creating more programs to help connect aging farmers with non-family successors can help keep more family farms viable and productive for years to come (Valliant et al. 2019). Goeller (2012) refers to several states, including Nebraska, that have “legislated for

beginning farmers tax credit programs, encouraging landlords to rent agricultural assets to beginners” (162).

Taxes are a huge problem with land transfers, whether it be inheritance tax, estate tax, and taxes on sales between owner and successor. Taxes can hinder successful land transitions pre death and especially post death (Whitehead, Lobley, and Baker 2012). The government could incentivize family farm succession through facilitation and or through financial support. States could consider giving farms that have a succession plan in place additional points toward eligibility for competitive programs or large tax breaks (Pitcoff 2013). Whitehead, Lobley and Baker (2012) suggest a fiscal provision providing that the estate is transferred to the beneficiary(ies) and the benefactor survives this transfer by seven or more years, the inheritance tax is avoidable. As more land is threatened by development pressures, large-scale land accumulation and ownership by corporations and high net worth owners, more family farms will diminish. The government should recognize the potential role they can play in family farm succession planning by putting fewer subsidies in the hands of large corporations, and more in the hands of farm families.

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### ***III. Community Food and Agriculture Coalition Internship***

#### ***Internship Description***

CFAC’s mission is “to grow a healthy local food community by preserving farmland, teaching new farmers, and making food accessible for all” (CFAC 2023a). The three focus areas are farmers, farmland, and food access. CFAC’s vision statement reads as follows:

- CFAC prioritizes engagement with community members from all backgrounds to identify pressing local issues and respond with leadership and passion.
- CFAC values a solution-oriented teamwork approach in all we do that prioritizes connectivity and collaboration.
- CFAC takes an innovative and creative approach as we work toward positive change and increased sustainability in Montana’s local food system.

(CFAC 2023a)

[Farm Link Montana](#) is an extension of CFAC’s resources to farmers and agricultural workers.

This website is a one-stop shop for finding help with challenges including finding land, accessing markets, tracking down financing, building a profitable business, and hiring and keeping employees. CFAC’s Farm Link Programs include beginning farmers linked to internships, mentorships, and land, and an online clearinghouse of the people, tools, and resources in Montana that will help get farms started (Farm Link Montana 2023). The website has a portal for individuals to post farm jobs, available land, farmers looking for land, and agriculture associated networks.

From January of 2022 until June of 2022, I interned with [Community Food and Agriculture Coalition](#) (CFAC 2023a), supervised by Mary Ellis, Beginning Farmer, and Rancher Program Manager. I first worked with Mary Ellis on a community outreach project in the Fall of 2022, writing a paper on cooperative landownership models in Montana. Once I began compiling information and conducting interviews, I realized how pressing land access is for the state of

Montana given its aging farming and ranching population. My internship with CFAC gave me the opportunity to expand my knowledge about critical issues in the food and agricultural realm of Montana. I completed over 125 hours of work within a five-month period, primarily working on the Farm Link Montana website. My projects, listed below, ranged in variety and duration, with the majority of my time being spent learning about, researching, and working on the resources available to landowners looking to rent or sell their land to those who are seeking land (aka Land seekers) in order to expand or start their own farm operation.

Young aspiring farmers face many obstacles today. Land access and land affordability prevent young farmers from securing land. Land access is the way farmers and ranchers acquire land to support their operations. This involves land seekers, landowners, real estate agents, service providers, and community members. CFAC understands the increasing average age of farmers and ranchers in Montana potentially impacts the next generation of farmers' success. The next generation's success needs to entail agricultural land staying in the hands of agricultural producers. Finding secure access to land is the number one barrier preventing a generation of growers from entering the field. In the coming years, almost 400 million acres of farmland are expected to need a new farmer (National Young Farmers Coalition 2023). Across the country, climbing land prices and competition with the development market have made it difficult for farmers to find land they can afford. Land is being lost to development as fewer stewards to farmland remain (National Young Farmers Coalition 2023). My internship work was full of tasks aligning with land access education and the building of resources to facilitate succession.

### ***CFAC Projects***

*Redesigned the "Securing Land", "Landowner", and "Land Seeker" webpages on Farm Link Montana*

[Farm Link Montana](#) is a web-based resource targeting western Montana farming community members looking for educational tools, information on programs, networks, and land availability. The website is user friendly, but some webpages needed to be updated. I was asked to research other agricultural education websites, such as [Land for Good](#), [Farm to Farmer](#), and [Vermont Land Link](#) to compare their resource pages to Farm Link Montana. Mary Ellis and I found that the Farm Link resource pages were cluttered, hard to follow, and too wordy. The pages we felt needed the most work are titled, “Land Access”, “Land Seeker”, and “Landowner” pages.

We recognized the need to provide more links, helpful tips, tools, and worksheets to land seekers and landowners. Most of the information on the pages was useful, but the format felt overwhelming. Mary Ellis trained me to use Word Press, a website builder, and I started to reconfigure the webpage by sectioning relevant links and information, adding more photos to make the page feel welcoming, and condensed long paragraphs. By sectioning the webpage, the user can find exactly what they need in one location without sifting through long paragraphs, potentially losing interest, and leaving the website. The Land Access webpage is sectioned into purchasing land, inheriting land, succession, and leasing. The purpose of this webpage is to provide examples, worksheets, and different methods of accessing farmland. Leasing land is the largest section because it provides information to find available land to lease, how to create a lease, considerations before approaching a landowner, and lease examples for different farming operations such as cattle ranching, vegetable farming, etc.

The Landowner and Land Seeker webpages provide relevant information on applying and posting a listing on the Farm Link Montana database. These pages provide details on how to apply for a listing, what steps should be accomplished before reaching out to a landowner or land seeker, and where to find educational opportunities through CFAC or other agricultural education



services. By updating the webpages, we noticed the tools and resources needed for certain demographics such as landowners seeking knowledge on leasing their property.

#### *Updated Listings on Farm Link Montana*

The Farm Link Montana listings of land available and land seekers needed updates. CFAC does not have one individual running the site, so some listings were outdated. In order to update listings from land seekers and landowners, I created a survey distributed via email to all land seekers and personally contacted all landowners. The surveys provided feedback from their experience with the website, if they had any concerns or questions, and what other programs would benefit them. Most land seekers were surveyed through an online questionnaire sent via email. Most landowners were interviewed over the phone. The purpose of the land seeker survey was to have individuals update their listings or remove their listings and provide CFAC feedback about the listing portal. The feedback questions helped us figure out what most of the land seekers were searching for (purchase or lease) and whether any connections were made through the platform. I decided to interview the landowners over the phone because I wanted to ask more conversation-like questions about their experiences with the site, their land, their listing, and ways I could help. I downloaded all the landowner's contact information into an excel sheet and added questions into each column. In 2022, the database had 24 landowner listings and 73 land seeker listings. After the land seeker survey, over 40 land seekers decided to not update their listing and take their listing down from the database. Appendix III provides direct feedback on why that is.

Based on the conversation, not all questions were asked. Some conversations were brief while others lasted more than an hour. The questions were primarily about whether the landowner still wanted their listing on the database, and if not, why. An important question asked was “what

were some barriers to leasing or purchasing the land?” Some landowners said, “no one has reached out yet” and others were struggling to find a good connection with land seekers. After my conversations, I realized the need for a Montana-based leasing guide created primarily for landowner education. A leasing guide could be immensely helpful for individuals in the preliminary stages of seeking land. All the information collected for landowners and land seekers was synthesized in a document and given to Mary Ellis.

### *Created a Leasing Guide*

After my interviews and surveys were finished, I presented my next steps for the organization, including the creation of a Montana leasing guide. Many organizations have created guides, workbooks, and informational sheets for landowners to refer to. Montana State University Cooperative Extension service has a whole webpage dedicated to landowner information regarding land transition, leasing, and land access. However, I saw a need for an engaging guidebook that can help initiate and facilitate a well-prepared conversation between a landowner and a land seeker. I found similar guides created by other organizations, but none of them directly discuss Northwest farming or Montana. When discussing this project with CFAC staff, I mentioned how Montanans have a strong sense of place, and as much as other organizations can provide the resources for landowners, some individuals prefer Montana-based resources relevant to their situation and landscape. CFAC agreed with my thought process and encouraged me to take on this project. I spent over a month researching and designing a welcoming resource with space designated for questions and notes. This 20-page leasing guide provides an example of a lease agreement, a list of agricultural leases used for different farm operations, questions to consider, goals for one’s land, and establishing a good tenant-landlord relationship (see appendix D).

### *Presented at the Certified Farm Startup Program*

The CFAC Certified Farm Startup Program is a “certification program for aspiring farmers that utilizes performance-based teaching methods to deliver the skills and tools needed to access farmland and start a farm business” (CFAC 2023b). The curriculum covers many topics including business planning, livestock and crop farming practices and land lease and purchase strategies. My presentation covered topics ranging from lease agreement strategies, necessary questions when accessing land, how to develop a strong renter-landlord relationship, etc. As one of my final tasks for my internship, this presentation was a great conclusion and synopsis of everything I had learned over the course of 6 months.

### *Reflection*

I knew I wanted to work with CFAC after meeting Mary Ellis at the EVST retreat in the early fall of 2021. Mary Ellis was a previous graduate of the EVST Masters’ program and has worked for CFAC for several years. She explained her role in the organization, and her journey to getting the job as Program Manager for beginning farmers and ranchers. At the time, I was a new graduate student passionate about land transition and land access for beginning farmers and ranchers. CFAC’s work aligned with my passions towards a generation of sustainable agriculture and cultivating a community around a local food system.

After that retreat, I reached out to Mary Ellis inquiring about a research project for my scientific approaches class. She presented many research ideas and eventually allowed me to take the project in my own direction. That small exposure to CFAC’s work was a positive experience and challenged me to take on a research task outside of my comfort zone. CFAC is doing incredible work for the agricultural community in western Montana, and I recognized an opportunity to help support their outreach. By taking on an internship role, I was able to learn new skills, be

exposed to a nonprofit and its work life with meetings and check-in opportunities, create new content and resources, and get experience doing interviews and surveys.

Due to Covid, my internship was mostly remote, which was new to me. Prior to graduate school, I worked on farms, in restaurants, and at my undergraduate college. Being on my computer and doing mostly research felt less immediately gratifying. I hoped to be in an office space with like-minded individuals because social workspaces keep me accountable and energized. In addition, the internship was more hands-off than I anticipated. I had weekly zoom check-ins with Mary Ellis and Nicole Jarvis, the Beginning Farmer and Rancher Program Coordinator, and a weekly zoom meeting with the whole staff. Otherwise, I worked mostly alone on my computer at home. This work atmosphere had some benefits and drawbacks, such as a flexible work schedule, but with minimal differences between work, school, and life space. In most cases, I completed tasks on time or quicker than anticipated because I could work at any time. However, I felt a sense of burnout by the end of the internship due to an overwhelming work and school schedule. I did enjoy the sense of freedom the internship provided me by being responsible for my own projects, conducting my research and interviews with support from CFAC staff. This internship exposed me to the life of working in a nonprofit. The work was more task and project focused, which allowed me to accomplish more without having hard deadlines. The internship taught me a necessary lesson on balance to prevent burnout. I still struggle to find balance between work and life, but I try to designate certain hours during the day to concentrate on specific projects. I realized how much I wanted to work with individuals in an office setting or in the field. The employees at CFAC are incredibly passionate and work tirelessly for the community, but all of them really emphasized their need for a life balance as well.

As I started my interviews with landowners, I noticed the number of individuals wanting more educational opportunities about retirement, farmland succession, land transitioning, and farmland lease agreement. Farm Link Montana does not have a permanent position yet for maintaining the website and database. When mentioning this opportunity to Mary Ellis, she recognized the need for a person to be a direct contact for Farm Link Montana, but funding opportunities were not feasible at the time. In other farm or land link programs across the country, an employee helps land seeker and landowners match and connect, similar to a dating service. There are a range of approaches to land links such as a staff person or a dedicated service. It was exciting to get so much feedback and gain my own knowledge and awareness of this issue, but I was disappointed by the limitations. I kept wondering why federal agencies such as the U.S. Department of Agriculture did not provide these resources or why nonprofit agencies are taking on a role a public agency should be already providing. I kept grappling with the idea of connecting aging farmers and landowners with beginning farmers and ranchers. The Farm Link Montana database is a great idea with great success rates across the country, but land prices are increasing every year making land access for younger individuals more challenging. I hope CFAC receives the necessary funds to hire an individual who can be the spokesperson for the database by doing continual outreach in the community.

In some ways, landowners hold a significant amount of decision-making power for the landscape's future. They determine whether their land goes to development, a farmer, or a nonfarmer. However, the farmer does not have absolute power and is constrained in a lot of ways. Price is one of the biggest variables in their decision. In sizable rural spaces, farmland is not as desirable as urban/suburban farmland. There is not a clear solution to the farmland access problem because each farmer and family has their reasons for selling, succeeding, or developing

their land. The older generation of landowners rely on their property as an asset for retirement, while the younger generation is acquiring land in a competitive market with land priced at a development rate or higher. Conservation easements, conservation land trusts, and community land trusts could be a piece to the puzzle but can be controversial. My research exposed the many complications to land access in the United States, and these complications kept me searching for answers to help.

The span of my internship provided me with a range of experiences that enhanced my skills and knowledge about land access, and my knowledge of working in a small nonprofit setting. I cultivated my research skills through interviews, conducting surveys, and I gained a wealth of knowledge about land assessment, land transition, conservation easements, and leasing farmland. Working with CFAC highlighted the many details that go into creating an educational program and being an educator and an advocate for beginning and aging farmers. This internship encouraged me to step out of my comfort zone and find confidence in my interviewing skills, communication skills, and interpersonal skills. I feel proud of the resource I created for CFAC because it encompasses all the useful information I absorbed through research, meaningful conversations, and collaboration amongst peers.

This internship was foundational to my understanding of the current national, state, and local food system situation. This experience shaped my future work advocating for better farmland succession and transitions.

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# Appendix I: CFAC Leasing Guide

CFAC

Farm Link Montana

Spring 2022

## LEASING GUIDE



This guide is intended to assist landowners in making their land available for farming by others. Good farmland is increasingly difficult for farmers to access – especially new farmers. Unfortunately, substantial amounts of good farmland are sold to development and lost forever. Yet, farmers are eagerly looking for land to farm. By making your land available to them, you will be helping contribute to the local food and farm economy. This guide will help lay out farm leases, the different options to making your land available, and establish your goals and objectives. Addressing themes such as stewardship, financial needs, and easements will improve life for farmers and landowners, especially to avoid misconceptions in the lease process.

### Types of Farm Operations

- **Animal Production** - Require a reliable source of water, adequate fencing, shelter such as open-sided sheds or closed barns, and an area of non-wetland pasture adequate to maintain the animals without soil deterioration
- **Dairy Farm** – Require climate-controlled milking parlors, suitable fenced pasture and paddock space, barn space, and water supply
- **Diverse Farm** – operations that grow plant crops and raise animals. With this integrated system, farmers can rotate animals and plant crops to take advantage of the way both can complement each other and the land
- **Greenhouse Production** – whether in the form of hoop house structure or temporary or permanent greenhouses, this allows farmers to extend their season or possibly grow vegetables or flowers year-round
- **Hay or Grain Production** – requires fields with good access to tractors and other equipment, and reasonably level terrain
- **Tree/Perennial Production** – requires a long-term commitment. Most fruit trees and shrubs require several years after planting before the first crop can be harvested
- **Vegetable & Flower Production** – Requires better soil than hay or pasture. Marketing vegetables and flowers can be done through an on or off site farmstand

### Benefits to leasing land for farming:

- Land management that meets your stewardship goals
- Increased local food production
- Offering an opportunity to a new farmer or farm family
- Keeping your working landscape open and in production
- A potential revenue stream



**Community Food & Agriculture Coalition**





### Tenure Security

Tenure security basically means giving your tenant confidence that they will be able to farm the land long enough to receive the benefits from sustainable practices, such as soil conservation and nutrient management. This is primarily accomplished by providing a lease term of five years or more. The longer the lease term the greater the stake the tenant has in the sustainability of the farm.

### Investment Protection

Typically, any non-removable improvements made on the land by a tenant become the property of the landowner. A tenant is, therefore, not likely to make sustainable investments unless they are assured that any unused portion of their investment will be reimbursed to them.

### Conservation Plans

Mandatory provisions can be specific to practices that are helpful where the landowner has special concerns. Concerns could be damage to landscape, infrastructures, or natural resources.



## TYPES OF AGRICULTURAL LEASES

### 1. Cash Lease

Tenant pays a flat fee for the use of the land for a specific period

- a. Simple, minimal financial risk, and maximum freedom for tenant
- b. May need to renegotiate cash rate yearly, and all production risk resides with the tenant

### 2. Flexible Cash Lease

Agreement is more in tune with prices and yields and can be drafted to vary with such prices and yields

### 3. Crop Share Lease

More complex than a cash lease. Risks resulting from low yields or market prices are shared between two parties, as are profits. Risks are shared with the landowner; therefore, the landowner and tenant must agree on how production expenses are shared and cropping plans

### 4. Lease with option to purchase

Gives the tenant the opportunity to buy the property after a special period. The two common forms of this option: a “straight” option and a “right of first refusal” option. When either option is exercised, the lease ends, and the parties enter a seller-buyer relationship

### 5. Long-term Lease

Long term leases of 5 to 99 years enable the tenant to justify investments to improve the property, although the lease itself may not require or reward such improvements

- a. Provides tenure security for the tenant, which can encourage the adoption of long-term conservation practices

### 6. Pasture Lease

Typical methods include rate per acre, fixed rate per animal per month, fixed rate per animal unit month per year or per season, partial year leases, or full year leases

### 7. Graduated Rent

Rent that is initially low but gradually increases. Reducing the rent, at least initially, is an obvious way to help a new farmer

### Points to Consider Regarding Your Land

- Where do you and others involved in decision-making about the farm property stand on land ownership and the division of rights and responsibilities?
- What natural features and infrastructure does your land offer?
- Do you need to derive net income from the use of the property or just cover costs?
- What are your feelings about natural resource stewardship and responsibility to the community?

## Infrastructures & Facilities



The availability of buildings, particularly housing, is critical for many farmers. This is often overlooked, but availability is just as crucial as affordability. The potential of your land is determined partly by infrastructures that already exist on site. Irrigation, storage facilities, livestock housing make certain types of agriculture more viable on a given piece of land. If infrastructures do not exist, it may be possible to allow permanent or temporary structures such as greenhouses.

### LANDOWNER LEASING GOALS EXAMPLES

- Minimize conflict with tenants
- Contribute to better environmental conditions
- Help younger farmers and/ or family members get started in farming
- Reduce income, social security, and estate taxes
- Maintain financial risk at a level that is compatible with financial security and comfort level
- Maintain appearance and usefulness of building and improvements
- Maintain the productivity of the land and improvements

**When considering your goals, consider what the farm tenant's goals could be such as:**

- Reduce Financial Risk
- Enjoy Managerial Freedom
- Have access to land for farming without going into debt by purchasing
- Increase security of being able to operate the property in the future

### CONSIDERATIONS:

- Are any farm equipment or resources available for the farmer? If yes, how will equipment maintenance be handled?
- Does your property offer buildings such as storage infrastructures, barns, sheds, and or potential processing space?
- Who pays for any utilities to the property such as electric, trash, and water? Is water available or provided in the lease?
- Is housing included or building a residence an option (such as tiny home, yurt, trailers)?
- What are the natural features of your land? Soil suitability, wetlands, ponds, wooded areas, or pasture?
- Identify who owns new structures and other improvements at the expiration of the lease or sooner termination

### Notes

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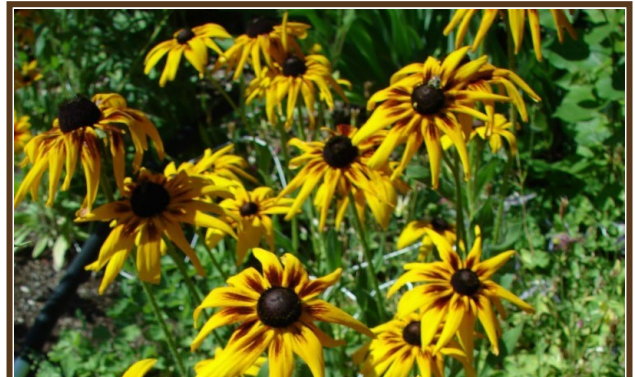
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# Yes, No, Maybe, and *Your* Goals

The time leading up to a meeting is when some of the most important work is accomplished. Reflecting on your goals, the operations you see on your land, the resources you bring to the lease, and understand the resources you may lack. Develop answers to each question as you work through this guide.

## WHAT ARE YOUR GOALS

Start with four key goals for your land

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

**What is your vision for your farm? What leasing option might agree with your vision, address your concerns.**

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When it comes to figuring out operations, conservation, and accessibility, both the landowner and the land seeker should consider what is needed from each other, and what each is willing to bring to the negotiation such as housing, animals, pesticide application use, risk burden, level of involvement, farming practices, and agrotourism potential.

Yes	No	Maybe

## ◦ WHAT MAKES A GOOD LEASE? ◦

### Benefits of a Written Lease

- Receive Assistance from Natural Resource Conservation Service
- Apply for Farm Service Agency Programs
- Apply for Agricultural Grants
- Evidence of Lease Terms
- Added Protection to both Landlord and Tenant



Leasing can be as simple as an agreement on payment and a handshake, but a written agreement is a good idea whether you are paying rent, working on shares, or permitted to use the land free of charge. If something should go astray, you will be glad that you have it. The number one goal of a lease is to develop a fair agreement where both parties feel that their needs and goals are identified. This can only be attained through **GOOD COMMUNICATION!** A lease with specify terms, provisions, and stipulations under which the renter and the owner will operate.

Writing a good lease may require looking at different options beyond a standard agreement. Try to find which terms lengths, elements, payments, provisions, and uses fit you and your potential tenant's situation. Refer to the **NEXT PAGE** for an outline of this information.

### Establishing a Good Tenant-Landlord Relationship

Potential tenants and landlords used to be familiar with each other through the community or family, but now more common, landowners are not all that familiar or have had no interactions. Therefore, it is understandable to find other ways to find a qualified candidate.

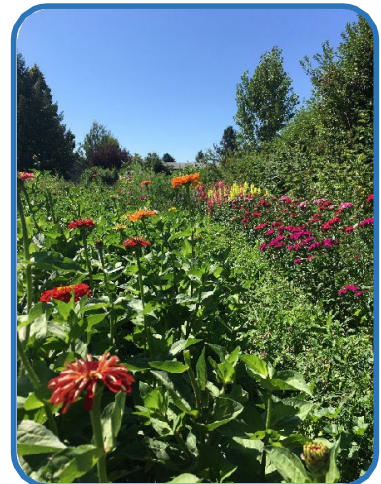
#### What's your criteria and qualifications for a tenant?

- Personal qualities
- Professional qualities
- Financial requirements
- Farm operation expectations
- Business plan
- References

A successful relationship strategy depends on effective communication. **Effective communication boosts the tenant's confidence in their landowners' commitments to the continuation of the lease agreement.** Communications with your tenant can be done informally or can be required through formal reports and monitoring in the lease agreement. Using both ways will probably be beneficial so long as communication maintains through the lease term.

**When first meeting, whether it be over the phone or at the kitchen table, try to address all possible situations that could arise under the agreement.** As the lease continues, it is important to remain flexible and open to re-negotiation on matters that were not addressed in the initial lease or as matters arise.

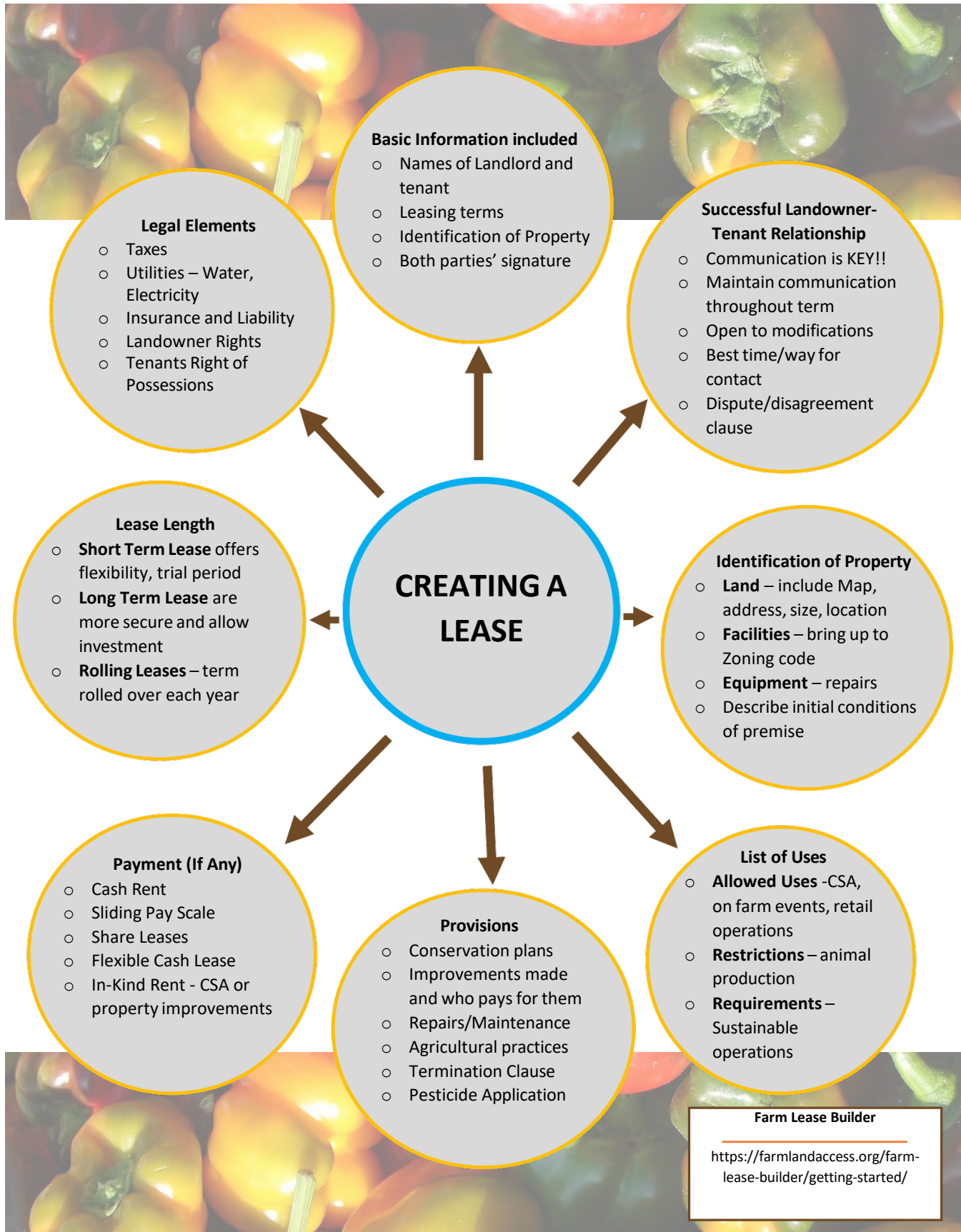
**Lastly, building a strong relationship and healthy communication will be beneficial when mistakes are made.** Allow for correction and resolution before terminating the lease and destroying the relationship. Addressing these items before the lease can be uncomfortable but can break those barriers that can feel restraining in a lease agreement.



#### What are YOUR Roles?

Whether you are renting to a vegetable farmer or rancher, establishing one's roles in this agreement is key. It would be beneficial to include good verbiage about who will monitor and do what on the lease: Irrigation, fence repair, weed management, forage monitoring, etc.





## PASTURE LEASE AGREEMENT EXAMPLE

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THIS PASTURE RENTAL AGREEMENT (hereinafter "the Agreement") is entered into on April 1, 2022, between \_\_\_\_\_ (name) \_\_\_\_\_ (hereinafter "Lessee"), \_\_\_\_\_ (address \_\_\_\_\_) and \_\_\_\_\_ (name) \_\_\_\_\_ (hereinafter "Lessor"), \_\_\_\_\_ (address) \_\_\_\_\_.

### WITNESSETH:

1. **RENTAL:** Lessor does hereby rent to, and Lessee does hereby hire from Lessor, for the term and upon the conditions stated herein, that real property situated in the County of \_\_\_\_\_, State of Montana, as described and depicted in Exhibit "A" attached hereto and incorporated herein by this reference, and hereinafter referred to as the "Premises".
2. **BUSINESS PURPOSE:** The Premises are to be used non-exclusively by Lessee for the specific and sole purpose of cattle grazing.
3. **TERM:** The term of this Lease shall commence on \_\_\_\_\_ and shall end \_\_\_\_\_. Lessee shall promptly vacate the Premises upon the termination of the Lease. Such termination shall not affect Lessee's obligation to make all rental and or other payments due for the period for which the Lease was in effect, nor shall it affect Lessor's obligation to reimburse Lessee for certain capital improvements and alterations made while the Lease was in effect.
4. **RENT:** Lessee shall make a down payment of \_\_(dollar amount if applicable)\_\_ due payable before \_\_(date)\_\_. In addition, Lessee shall maintain and submit to Lessor an Actual Use Record (Exhibit "B") no later than \_\_\_\_\_. Once received, Lessor shall invoice Lessee the balance of rent due based on this Record at a rate of \$20 per Animal Unit Month. Rent shall be paid no later than 14 days from the date of the invoice and shall be paid in lawful money of the United States to Lessor at \_\_\_\_\_.
  - a. In the event payments become overdue, interest shall accrue on the balance at a rate of 12% per annum.
5. **GRAZING STANDARDS:**
  - a. Lessee may graze the \_\_\_\_\_ Acre, Upper and South Pastures. The Upper Pasture will be rested until after seed set in (certain year), at which time grazing can occur. Lessee shall ensure that the fence between Upper pasture and South pastures is adequate to contain livestock.
  - b. Lessee's cattle may graze no more than 50% (by weight) of the current year's production of rangeland grasses. In no event shall Lessee permit its cattle to overgraze the Premises. In the event Lessee overgrazes the Premises (beyond the 50% utilization by weight), Lessor at its discretion, shall be entitled to the following remedies: using temporary fence to exclude cattle from over-used areas, entirely at Lessee cost; or the removal of cattle from the Premises.
  - c. The Annual Operating Plan for grazing on the Premises is described in Exhibit "C". Lessee shall not deviate from this plan unless prior written approval is granted by the Lessor.
  - d. Lessee will contact Lessor prior to turnout of cattle onto the Premises.
  - e. Salt and mineral will be used on the Premises to properly distribute livestock. It will be placed no closer than 2500 feet from riparian areas or other water sources and shall be relocated on the Premises from time to time within a given grazing season.
  - f. All cattle must be removed from the Premises no later than September 1.
  - g. Lessor will not be liable for the loss, injury or change in the health of Lessee's livestock.
6. **LIVESTOCK CONTROL:** Lessee is responsible to prevent grazing animals from trespassing on land adjacent to the Premises including private, State and Federal land. Lessee agrees to be responsible for all damage and claims made against Lessee or Lessor as a result of said trespass.

\_\_\_\_\_ Lessor

\_\_\_\_\_ Lessee

1. **REPAIRS AND MAINTENANCE:** Lessee agrees to make all repairs and maintenance, as it pertains to livestock structures used specifically for management and containment of livestock, including, but not limited to fences, water tanks, and water pipelines. Said repairs and maintenance shall be at Lessee's sole cost and expense, including labor and materials, except in the case where the cost of any single repair project exceeds \$500. In such an event, Lessee will notify Lessor in writing when repairs related to a single repair project will exceed \$500, at which time, Lessor, at its sole discretion, may agree to compensate Lessee for the balance exceeding \$500. If Lessor exercises its option not to compensate Lessee for repair costs exceeding \$500, Lessee may elect to complete the project at their sole cost, or not exceed the \$500 in repairs. Where repairs are warranted resulting from negligence of Lessee, and in such case, Lessee agrees to make full repairs necessary so as to fulfill the terms of this Lease, at the sole cost and expense of Lessee. Lessee agrees that all such work will comply with all laws, ordinances, rules and regulations of the State of Montana, \_\_\_\_\_ County or any other authorized public authority. Lessee further agrees to hold and save Lessor free and harmless from damage, loss or expense arising out of said work. Lessee further agrees to turn over the all livestock structures under this lease to Lessor at the conclusion of the Lease in the same condition as when received, ordinary wear and tear excepted. All repairs and maintenance shall remain in and be surrendered with the Premises as part thereof at the termination of this Lease, without disturbance, molestation or injury.
2. **ALTERATIONS:** Lessee shall not make any alterations, additions or improvements to the Premises without the prior written consent of Lessor, which consent shall not be unreasonably withheld, and all alterations, additions and improvements which shall be made, shall be at the sole cost and expense of Lessee and shall remain in and be surrendered with the Premises as part thereof at the termination of this Lease, without disturbance, molestation or injury. If Lessee shall perform work with the consent of Lessor, as aforesaid, Lessee agrees to comply with all laws, ordinances, rules and regulations of the State of Montana, \_\_\_\_\_ County or any other authorized public authority. Lessee further agrees to hold and save Lessor free and harmless from damage, loss or expense arising out of said work.
3. **WEED CONTROL:** Lessor shall be responsible for management and control actions against Montana Category I noxious weeds, on the Premises.
4. **ACCESS:** Lessor shall continue to have unlimited access to the Premises at all times to inspect and verify compliance with the terms of this Agreement, to occupy and use the Premises reserved for Lessor, and for any other uses and purposes which do not unreasonably interfere with the Agreement purposes. Lessor may also grant access across the Premises to others (including their livestock) to reach lands not included in this Lease.
5. **INDEMNIFICATION:** Lessee promises to indemnify and hold Lessor, its members, managers, officers, employees, contractors and agents harmless from any claims, demands, losses, causes of actions or expenses in connection with this Agreement and any farming, ranching, construction, maintenance or operational activities on the Premises or equipment. Lessee assumes the duty to inspect for dangerous or potentially dangerous conditions on the Premises or access thereto, which are apparent, known, unknown, or which reasonably should be known by inspection and upon discovering any such condition to so warn and notify its own employees, contractors, subcontractors or agents and to notify Lessor in writing. The parties agree that Lessor shall have no duty to limit or prevent access to the Premises, and Lessor shall not be liable for any theft of, or vandalism or intentional or negligent damage to Lessee's equipment, property, or livestock kept or used on the Premises.
6. **INSURANCE:** Lessee must meet the following insurance requirements and shall obtain and keep in force during the term of this Lease and any extensions thereof the following policies of insurance:
  - a. **Workers' Compensation Insurance.** For each of its employees at the Premises, Lessee shall keep and maintain workers' compensation insurance as required by law. Lessee will further ensure that any contractors or subcontractors employed by him shall have workers' compensation insurance or a certificate of exemption there from for each and every person working on the Premises.

\_\_\_\_\_ Lessor

\_\_\_\_\_ Lessee

- b. **Personal Injury and Property Damage Liability Insurance.** It is expressly understood and agreed that Lessor shall not be liable for damages or injury to Lessee or its property, or to Lessee's employees (or employees'

property), customers, agents, and invitees from whatever cause arising, and Lessee shall indemnify, defend, save and hold harmless Lessor, its trustees, employees and agents against all liability, claims, suits or action of whatsoever nature, loss or expense, including attorney fees and other expenses incident thereto, and against all claims, actions and judgments based upon or arising out of damage or injury or death to persons or property unless the direct result of Lessor's willful act. Lessee shall provide public liability insurance with a policy limit of not less than \$1,000,000 for each occurrence, \$2,000,000 aggregate. A certificate of insurance, naming Lessor as an additional insured, shall be provided to Lessor at each policy renewal

- a. **Lessor's Right to Pay Premiums on Behalf of Lessee.** All of the policies of insurance referred to in this section shall be written in form reasonably satisfactory to Lessor and by insurance companies reasonably satisfactory to Lessor. Lessee shall pay all of the premiums therefore and deliver such policies, or certificates thereof, to Lessor, and in the event of the failure of Lessee, either to effect such insurance in the names herein called for or to pay the premiums therefore or to deliver such policies, or certificates thereof, to Lessor, Lessor shall be entitled, but shall have no obligation, after fifteen (15) days' notice to Lessee to effect such insurance and pay the premiums therefore, which premiums shall be repayable to Lessor within 30 days of above said notice, and failure to repay the same shall carry with it the same consequence as failure to pay any installment of rent. Each insurer mentioned in this section shall agree, by endorsement on the policy or policies issued by it, or by independent instrument furnished to Lessor, that it will give to Lessor fifteen (15) days' written notice before the policy or policies in question shall be altered or canceled. Lessor agrees that it will not unreasonably withhold its approval as to the form or to the insurance companies selected by Lessee.
  - b. **Blanket Insurance Policies.** Notwithstanding anything to the contrary contained in this section, Lessee's obligations to carry the insurance provided for herein may be brought within the coverage of a so-called blanket policy or policies of insurance carried and maintained by Lessee; provided, however, that the coverage afforded Lessor will not be reduced or diminished or otherwise be different from that which would exist under a separate policy meeting all other requirements of this Lease by reason of the use of such blanket policy of insurance.
2. **DAMAGE OR DESTRUCTION:** In the event the Premises are damaged to such an extent as to render the same unusable in whole or in a substantial part thereof (e.g. fire), Lessee shall give Lessor immediate notice thereof. Lessee shall have not more than 2 days after date of such notification to vacate the Premises in its entirety, and then this agreement shall be terminated unless otherwise determined by Lessor. Rents due to Lessor will be based on the AUMs utilized prior to the point the Premises were damaged.
  3. **LIENS AND INSOLVENCY:** Lessee shall keep this Agreement free from any liens arising out of any work performed, materials furnished or obligations incurred by Lessee. In the event Lessee becomes bankrupt, or is judicially declared incompetent, or if a receiver, assignee or other liquidating officer is appointed for the business of Lessee, then Lessor may cancel this Agreement at Lessor's option.
  4. **SUBROGATION WAIVER:** Lessor and Lessee, respectively, contract to waive and release any right of recovery against each other for any loss, which is fully insured against in a fire policy or similar self-insurance program.
  5. **DEFAULT:** Should Lessor at any time terminate this Agreement for any breach by Lessee, in addition to any other remedy it may have, Lessor may recover from Lessee all damages incurred by reason of such breach, including the cost of recovering the Premises, and including the worth at the time of such termination of the excess, if any, of the amount of rent and charges equivalent to rent reserved in this Agreement for the remainder of the stated term over the then reasonable rental value of the Premises for the remainder of the stated term, all of which amounts shall be immediately due and payable from Lessee to Lessor.
  6. **NOTICE OF DEFAULT:** Lessee shall not be deemed to be in default or breach hereunder in the payment of rent, the payment of any other moneys as herein required, the furnishing of any insurance policy as required herein, or the keeping or performing of any other term, condition or covenant whatsoever of this Lease, and Lessor may not attempt to terminate this Lease, re-enter, re-take possession or maintain an action against Lessee, unless Lessor shall first give Lessee five (5) days written notice of such default or breach and Lessee shall fail to cure such default or breach within such five (5) days, *provided however*, that if such event of default or breach is of a nature which is not capable of cure (e.g. overgrazing), then this five-day cure period and notice of default requirement shall be inapplicable, and Lessor shall be entitled to terminate this Lease immediately upon written notice to Lessee
  7. **NONWAIVER OF BREACH:** The failure of Lessor to insist upon strict performance of any of the covenants and Leases of this Lease, or to exercise any option herein conferred in any one or more instances, shall not be construed to be a



waiver or relinquishment of any such, or any other, covenants or Leases, but the same shall be and remain in full force and effect.

1. **ASSIGNMENT:** Lessee shall not, without the prior written consent of Lessor in each instance first obtained, assign or permit the assignment of this Agreement, or any interest therein, whether voluntarily or involuntarily, or by operation of law or otherwise. No consent to such assignment shall operate to relieve Lessee or its successors in interest from the necessity of obtaining like consent for any subsequent assignment, and no assignment shall relieve Lessee of primary liability for all its obligations hereunder.
2. **HOLDOVER:** There shall be no holding over by Lessee upon expiration or termination of this Agreement without the written consent of Lessor, and Lessee further agrees to promptly vacate the Premises upon the termination of this Agreement.
3. **ACCIDENTS:** All personal property owned by Lessee on said Premises shall be at the risk of Lessee, except to the extent caused by the willful and wanton misconduct of Lessor, its contractors, agents and employees. Lessor or Lessor's agents shall not be liable for any damage, either to person or property, sustained by Lessee or others, caused by any defects now on said Premises or hereinafter occurring therein on the Premises or access thereto. Lessee agrees to defend and hold Lessor and Lessor's agents harmless from any and all claims for damages suffered or alleged to be suffered in or about the Premises by any person, firm or corporation, except to the extent caused by willful and wanton misconduct of Lessor, its contractors, agents and employees.
4. **USES PROHIBITED:** Lessee shall not use, or permit the Premises, or any part thereof, to be used for any purpose or purposes other than the purpose or purposes for which the Premises are described in this Lease; and no use shall be made or permitted to be made of the Premises, or acts done, which will cause a cancellation of any liability insurance policy on the Premises, or any part thereof, nor shall Lessee sell, or permit to be kept, used or sold, in or about the Premises, any article which may be prohibited by the standard form of liability insurance policies. Lessee shall not be entitled to exercise any hunting rights or other recreational uses on the Premises, said rights (including commercial hunting rights) being reserved unto Lessor.
5. **CONDEMNATION:** In the event public authority takes any part of the property in which the Lease Premises are contained, and the Premises become unusable, Lessor or Lessee may cancel this Lease upon ten (10) days written notice to the other party, and all damages shall belong to Lessor.
6. **CONDEMNATION:** In the event public authority takes any part of the property in which the Lease Premises are contained, and the Premises become unusable, Lessor or Lessee may cancel this Lease upon ten (10) days written notice to the other party, and all damages shall belong to Lessor.
7. **NOTICES:** All notices under this Lease shall be in writing and sent by U.S. mail, or may be personally delivered, to

Lessor:

Lessee:

ABC L.L.C

XYZ Ranch, Inc.

\_\_\_\_\_  
\_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

Any change in address shall be provided by each party to the other in writing. Notices shall be deemed given as of the date of personal delivery or deposit in U.S. mail.

8. **HEIRS AND SUCCESSORS:** Subject to the provisions hereof pertaining to assignment and subletting, the covenants and provisions of this Lease shall be binding upon the heirs, legal representatives, successors and assigns of any or all of the parties hereto.
9. **ATTORNEYS' FEES:** If any action at law or in equity shall be brought to recover any rent under this Agreement, or for or on account of any breach or default of, or to enforce or interpret any of the covenants, terms or conditions of this Agreement, or for the recovery of the possession of the demised Premises, the prevailing party shall be entitled to recover from the other party as part of the prevailing party's cost reasonable attorneys' fees, the amount of which shall be fixed by the court and shall be made a part of any judgment or decree rendered.
10. **TIME OF THE ESSENCE:** Time is hereby declared to be of the essence of each and every provision hereof, and no waiver of any breach of any condition or covenant shall waive any such condition or covenant or future breach thereof, or this covenant as to time.



### Grazing Plan

1	No. Head:	100+/-	Dates:	Spring
	Pasture(s):	100 Acre Pasture		
2	No. Head:	100 +/-	Dates:	Spring / Summer
	Pasture(s):	South Pasture		
3	No. Head	100 +/-		
	Pasture(s)	Upper pasture	Dates:	Summer

- The actual dates spent in any pasture depend on the number of cattle and growing conditions for the year. Grazing standards are the basis for moving cattle to another pasture
- Upper pasture is rested until after seed set in 2015
- The South Pasture can be used for holding cattle between moves. Standards stated in the lease remain in effect for this pasture.
- Once livestock leave the pasture, the regrowth will not be grazed again (With the exception of the 100 Acre Pasture).

## AGRICULTURAL LEASE AGREEMENT EXAMPLE

THIS AGRICULTURAL LEASE (hereinafter “the Lease”) made this 1st day of May 2022, by and between \_\_\_\_\_, of \_\_\_\_\_, Montana, (hereinafter “Lessor”) and \_\_\_\_\_ of \_\_\_\_\_, Montana, (hereinafter “Lessee”).

**WITNESSETH:**

1. The Lessor does hereby lease to Lessee, and Lessee does hereby hire from Lessor the real property, facilities, and appurtenant irrigation equipment situated in the County of Madison, State of Montana, more particularly depicted in **Exhibit “A”** attached hereto (referred to herein as “the Premises”)

**2. BUSINESS PURPOSE:** The Premises are to be used by the Lessee for the specific purpose of conducting the business of crop and livestock production.

**3. TERM:** The term of this Lease shall commence on the \_\_\_(start date)\_\_\_\_\_ and end the \_\_\_(end date)\_\_\_.

**4. RENT:** Lessee covenants and agrees to pay the Lessor the annual sum of \_(cash amount if applicable)\_ as rent for the Premises as specified herein. The breakdown on this cash value is displayed in Table 4.1. The annual rent shall be paid in lawful money of the United States to the Lessor at \_(mailing address)\_\_\_, or to such other place as Lessor may from time to time direct Lessee by written notification, according to the following schedule of installments:

- a. The first installment is one-quarter of the lease value (\$6,640) to be made on or before June 1.
- b. The last installment of the lease balance (\$19,920) will be made on or before November 1.
- c. In the event installments become overdue, interest shall accrue on the balance at a rate of 12% per annum.

Table 4.1

IRRIGATED LAND			
	<i>Acres</i>	<i>Price/ac</i>	<i>Total</i>
Hand Line	35	\$36	\$1,260
Pivot	253	\$100	\$25,300
<b>TOTAL</b>			<b>\$26,560</b>

**5. TERMS OF CROP LEASE:**

- a. Lessor makes available to Lessee irrigated land (as identified in Exhibit A) for the purpose of producing commercial crops including grain and forage.
- b. Lessee provides labor and equipment necessary (minus irrigation equipment) to grow, maintain, and harvest marketable crops on the Premises.
- c. Lessee provides labor and equipment necessary to control weeds and maintain 27 acres of fallow/idle handline ground identified in Exhibit A.
- d. Lessee may stack harvested hay in existing stack yards on the Premises or in other areas agreed to in advance of harvest
- e. Lessee agrees to purchase and apply fertilizer necessary to produce a reasonable crop on the lands that are the subject of this lease

\_\_\_\_\_ Lessor

\_\_\_\_\_ Lessee

- a. Subject to the limits of its water rights and contracts, Lessor agrees to provide irrigation water (including water fees) necessary to irrigate crops on the lands that are the subject of this Lease.
- b. Lessee will pay all electricity bills related to its agricultural operations, including the irrigation systems on the Premises. The Lessee will contract directly for such utility services and will pay the utility companies directly upon its receipt of any such bills.

**2. TERMS OF PASTURAGE:**

- a. Lessor agrees to make crop aftermath available for grazing on all irrigated land.
- b. Areas adjacent to crops may also be grazed.
  - i. Lessor shall not place salt or mineral in non-crop areas.
  - ii. Areas adjacent to irrigated crops will not be grazed more than 50% (by weight) of the current year's production.
  - iii. Areas adjacent to crops may not be re-grazed in the same year.
- c. In no event shall Lessee permit its cattle to overgraze the premises. In the event the Lessee overgrazes the premises, Lessor, at its discretion, shall be entitled to the following remedies: using temporary fence to exclude cattle from over-used areas, entirely at Lessee's cost; or the removal of cattle from the premises.
- d. Lessee agrees to provide necessary labor and equipment for grazing management, including, but not limited to moving livestock, fence maintenance, waterline maintenance, water hauling, livestock sorting, and doctoring.
- e. Lessee agrees to pay all care and nutritional needs of livestock, including, but not limited to hay, veterinarian fees, medicines, and feed supplements.

**3. LIVESTOCK CONTROL:** Lessee is responsible to prevent grazing animals from trespassing on land adjacent to the Premises. Lessee assumes all responsibility for all damage and claims made against Lessee as a result of said trespass.

**4. WATER RIGHTS:** The lands are leased together with such water rights and irrigation ditches, conveyances and equipment as are appurtenant to them. Lessee is entitled to the use of all water rights appurtenant to the Premises for the purpose of irrigating farm crops.

Lessor agrees to pay all expenses incurred or occasioned by the appointment of a Water Commissioner or Ditch Rider during the term of this Lease. Lessor agrees to take any action reasonable and necessary to defend the water rights appurtenant to the Premises so as to protect Lessee's right to continued usage of said rights during the term of this Lease.

**5. PEST CONTROL AND WEEDS:** The Lessor will be responsible for management and control of Montana State Category 1 Noxious weeds as they occur in non-cropland environments (e.g. pastures). The Lessee shall be responsible for management and control of weeds, including Montana State Category 1 Noxious weeds, as they occur in cropland environments (e.g. irrigated fields). All applicable label instructions will be adhered to in the application of restricted-use herbicides. Additionally, applicators of restricted-use herbicides will be properly certified by the State of Montana for such work. The Lessee, at his discretion shall control animal pests on the leased property, including ground squirrels. Control methods for pests shall comply with label instructions and applicable state and federal regulations.

\_\_\_\_\_ Lessor

\_\_\_\_\_ Lessee

1. **CONSERVATION AND RECLAMATION REQUIREMENTS:** The Lessee agrees to utilize best management practices in the farming, irrigating and ranching operations to prevent soil erosion, pollution to ground and surface waters, impacts to riparian areas and wetlands, and overgrazing. No additional lands will be plowed for cropping without the prior approval of Lessor. The Lessee shall not commit waste on the leased property and agrees not to drive or ride on the property so as to cause damage to roads, fields and rangeland areas. Lessee further agrees to utilize and comply with the reclamation standards of the Lessor for all activities involving any excavation or disturbance to the ground, other than customary tillage and farming operations. These standards include stripping and setting topsoil aside prior to excavation, replacing topsoil after excavation, re-establishing vegetation, and controlling Montana State listed noxious weeds.
2. **TAXES:** During the term of this Lease, the Lessor agrees to pay all the real property taxes applicable to the Premises and all personal property taxes on its own personal property (including irrigation systems). The Lessee agrees to pay all personal property taxes on its personal property located on the Premises or attributable to the exercise of its rights and obligations under the terms of this Lease.
3. **REPAIRS AND MAINTENANCE:** Lessee agrees to provide labor and materials for repairs to the Premises and improvements to keep it in its present condition. Said repairs include but are not limited to repair and maintenance of irrigation equipment, pumps, meters, piping and associated apparatus, buildings, facilities, and corrals. Lessee will notify Lessor in writing when repair costs are expected to exceed \$1,000. Lessor agrees, at its option, to compensate Lessee the balance of repair costs when such costs on a single repair project exceeds \$1,000, except in cases where repairs are warranted resulting from negligence of the Lessee, and in such case, Lessee agrees to make full repairs necessary so as to fulfill the terms of this Lease. If Lessor exercises its option not to make repairs in excess of \$1,000, Lessor agrees to reduce the lease on a prorated basis subject to the Lease valuation described in paragraph 4. The Lessee further agrees to turn over the irrigation equipment to the Lessor at the conclusion of the Lease in the same condition as when received, ordinary wear and tear accepted.  
Lessor and Lessee will cooperate on a semi-annual basis to inspect real property, facilities, and appurtenant irrigation equipment for the purpose of identifying maintenance and replacement priorities.
4. **CARE OF PREMISES:** Lessee will at all times keep the Premises neat, clean and in a sanitary condition with the prompt disposal of all waste materials, and other things not reasonably necessary to its ongoing operation or meeting the business purpose described in paragraph 2, above. The Premises shall at all times be kept and used in accordance with the laws, statutes, administrative rules and regulations of the U.S. Government and the State of Montana, and the ordinances of \_\_\_\_\_ County, or other applicable governmental entities, present or future, and in accordance with all directions, rules and regulations of the health officer, fire marshal, building inspector or other proper officers having jurisdiction, at the sole cost and expense of the Lessee; and Lessee will neither permit nor suffer any waste, damage or injury to the Premises.
5. **OCCUPATION:** Lessee may occupy the property for the purposes of this Lease (Paragraph 2) upon the execution of this Lease.
6. **ACCESS:** The Lessor shall continue to have unlimited access to the Premises at all times to inspect and verify compliance with the terms of this Lease, to occupy and use the facilities, structures, fixtures and equipment on the Premises reserved for the Lessor, and for any other uses and purposes which do not unreasonably interfere with the Lease purposes. Access includes but is not limited to commercial and personal hunting and fishing activities.

\_\_\_\_\_ Lessor

\_\_\_\_\_ Lessee

1. **ALTERATIONS:** Lessee shall not make any alterations, additions, or improvements to said Premises without the prior written consent of Lessor, which consent shall not be unreasonably withheld, and all alterations, additions and improvements which shall be made, shall be at the sole cost and expense of Lessee and shall remain in and be surrendered with the Premises as part thereof at the termination of this Lease, without disturbance, molestation, or injury. If the Lessee shall perform work with the consent of the Lessor, as aforesaid, Lessee agrees to comply with all laws, ordinances, rules and regulations of the State of Montana, \_\_\_\_\_ County, or any other authorized public authority. The Lessee further agrees to hold and save the Lessor free and harmless from damage, loss or expense arising out of said work. Upon the conclusion of this lease, Lessee shall be entitled to reimbursement of the prorated share of any capital improvement constructed and/or installed. All capital improvements will be amortized with the straight-line method and have a 7-year life, except alfalfa rotations which have a 4-year life. Lessee shall provide Lessor all invoices and valuations of said capital improvements at the time the improvement was made. In the event this lease is renewed with the Lessor, Lessee is not required to reimburse Lessee a prorated share of capital improvements.
2. **INSURANCE:** Lessee must meet the following insurance requirements and shall obtain and keep in force during the term of this Lease and any extensions thereof the following policies of insurance:
  - a. **Workers' Compensation Insurance.** For each of its employees at the Premises, Lessee shall keep and maintain workers' compensation insurance as required by law. Lessee will further ensure that any contractors or subcontractors employed by him shall have workers' compensation insurance or a certificate of exemption there from for each person working on the Premises.
  - b. **Personal Injury and Property Damage Liability Insurance.** It is expressly understood and agreed that Lessor shall not be liable for damages or injury to Lessee or its property, or to Lessee's employees (or employees' property), customers, agents, and invitees from whatever cause arising, and Lessee shall indemnify, defend, save and hold harmless Lessor, its trustees, employees and agents against all liability, claims, suits or action of whatsoever nature, loss or expense, including attorney fees and other expenses incident thereto, and against all claims, actions and judgments based upon or arising out of damage or injury or death to persons or property unless the direct result of Lessor's willful act. Lessee shall provide public liability insurance with a policy limit of not less than \$1,000,000 for each occurrence, \$2,000,000 aggregate. A certificate of insurance, naming Lessor as an additional insured, shall be provided to Lessor at each policy renewal.
  - c. **Lessor's Right to Pay Premiums on Behalf of Lessee.** All of the policies of insurance referred to in this section shall be written in form reasonably satisfactory to Lessor and by insurance companies reasonably satisfactory to Lessor. Lessee shall pay all of the premiums therefore and deliver such policies, or certificates thereof, to Lessor, and in the event of the failure of Lessee, either to effect such insurance in the names herein called for or to pay the premiums therefore or to deliver such policies, or certificates thereof, to Lessor, Lessor shall be entitled, but shall have no obligation, after fifteen (15) days' notice to Lessee to effect such insurance and pay the premiums therefore, which premiums shall be repayable to Lessor with the next installment of rental, and failure to repay the same shall carry with it the same consequence as failure to pay any installment of rent. Each insurer mentioned in this section shall agree, by endorsement on the policy or policies issued by it, or by independent instrument furnished to Lessor, that Lessee will give Lessor fifteen (15) days' written notice before the policy or policies in question shall be altered or canceled. Lessor agrees that it will not unreasonably withhold its approval as to the form or to the insurance companies selected by Lessee.

\_\_\_\_\_ Lessor

\_\_\_\_\_ Lessee

- a. **Blanket Insurance Policies.** Notwithstanding anything to the contrary contained in this section, Lessee's obligations to carry the insurance provided for herein may be brought within the coverage of a so-called blanket policy or policies of insurance carried and maintained by Lessee; provided, however, that the coverage afforded Lessor will not be reduced or diminished or otherwise be different from that which would exist under a separate policy meeting all other requirements of this Lease by reason of the use of such blanket policy of insurance.
2. **INDEMNIFICATION:** Lessee promises to indemnify and hold Lessor, its officers, employees, contractors, and agents harmless from any claims, demands, losses, causes of actions or expenses in connection with this Lease and any farming, ranching, construction, maintenance or operational activities on the Premises or equipment. Lessee assumes the duty to inspect for dangerous or potentially dangerous conditions on the Premises or access thereto and notify its own employees, contractors, subcontractors, or agents and to notify Lessor in writing of such conditions. The parties agree that Lessor shall have no duty to limit or prevent access to Lessee's leased Premises, and Lessor shall not be liable for any vandalism or intentional or negligent damage by third parties to Lessee's equipment and property.
3. **ACCIDENTS:** All personal property owned by Lessee on said leased Premises shall be at the risk of Lessee, except to the extent caused by the willful and wanton misconduct of Lessor, its contractors, agents, and employees. Lessor or Lessor's agents shall not be liable for any damage, either to person or property, sustained by Lessee or others, caused by any defects now on said Premises or hereinafter occurring therein on the leased Premises or access thereto. Lessee agrees to defend and hold Lessor and Lessor's agents harmless from any and all claims for damages suffered or alleged to be suffered in or about the leased Premises by any person, firm or corporation, except to the extent caused by willful and wanton misconduct of Lessor, its contractors, agents and employees.
4. **DAMAGE OR DESTRUCTION:** In the event the Premises and/or improvements are damaged to such an extent as to render the same unusable in whole or in a substantial part thereof, or is destroyed, it shall be the option of the Lessor to repair or rebuild the same, and after the happening of any such damage or destruction, the Lessee shall give Lessor immediate written notice thereof. Lessor shall have not more than sixty (60) days after date of such notification to notify the Lessee in writing of Lessor's intentions to repair or rebuild said Premises, or the part so damaged as aforesaid, and if Lessor elects to repair or rebuild, Lessor shall complete the work of such repairing or rebuilding without unnecessary delay. In the event Lessor elects not to repair or rebuild said destroyed premises, Lessor agrees to reduce the lease on a prorated basis subject to the lease valuation described in paragraph 4.
5. **USES PROHIBITED:** Lessee shall not use, or permit the Premises, or any part thereof, to be used for any purpose or purposes other than the purpose or purposes for which the Premises are hereby leased; and no use shall be made or permitted to be made of the Premises, or acts done, which will cause a cancellation of any liability insurance policy on the Premises (unless such policy is replaced within a reasonable period of time), or any part thereof, nor shall Lessee sell, or permit to be kept, used or sold, in or about the Premises, any article which may be prohibited by the standard form of liability insurance policies. Lessee shall not be entitled to exercise any hunting or fishing rights or other recreational uses on the Premises, said rights being reserved unto the Lessor.
6. **LIENS AND INSOLVENCY:** Lessee shall keep the leased premise free from any liens arising out of any work performed, materials furnished, or obligations incurred by Lessee. In the event Lessee becomes bankrupt, or is judicially declared incompetent, or if a receiver, assignee, or other liquidating officer is appointed for the business of the Lessee, then the Lessor may cancel this Lease at Lessor's option.

\_\_\_\_\_ Lessor

\_\_\_\_\_ Lessee



1. **NOTICE OF DEFAULT:** Lessee shall not be deemed to be in default or breach hereunder in the payment of rent, the payment of any other moneys as herein required, the furnishing of any insurance policy as required herein, or the keeping or performing of any other term, condition or covenant whatsoever of this Lease, and Lessor may not attempt to terminate this Lease, re-enter, re-take possession or maintain an action against Lessee, unless Lessor shall first in a written Notice of Default, delivered via Certified Mail, and Lessee shall fail to provide cure for such default or breach within 10 days of the date the Notice of Default was received.
2. **DEFAULT:** In the event a cure of any breach, as described in paragraph 23 above, is not completed or satisfactory to the Lessor, the lessee shall vacate the Premises, including cattle, equipment, machinery, supplies, and employee housing in no less than 40 days following the date the Notice of Default was received by the Lessee. At the end of the forty day (40) day vacating period, any proprietary interest of Lessee in and to any of its property, buildings, equipment, or crops not removed from the Premises shall be automatically transferred to Lessor, and all right, title, interest and ownership therein shall vest in Lessor. In the event of any breach of this Lease by Lessee, and no less than 40 days following the date of Notice of Default, Lessor, in addition to the other rights or remedies it may have, shall have the right to enter and remove personal property of Lessee from the Premises. Such property may be removed and stored in a public warehouse or elsewhere at the cost of, and for the account of Lessee. Should Lessor at any time terminate this Lease for any breach, in addition to any other remedy it may have, Lessor may recover from Lessee all damages incurred by reason of such breach, including the cost of recovering the Premises, and including the worth at the time of such termination of the excess, if any, of the amount of rent and charges equivalent to rent reserved in this Lease for the remainder of the current lease year, all of which amounts shall be immediately due and payable from Lessee to Lessor.
3. **NONWAIVER OF BREACH:** The failure of the Lessor to insist upon strict performance of any of the covenants and agreements of this Lease, or to exercise any option herein conferred in any one or more instances, shall not be construed to be a waiver or relinquishment of any such, or any other, covenants or agreements, but the same shall be and remain in full force and effect.
4. **ASSIGNMENT:** The Lessee shall not, without the written consent of the Lessor in each instance first obtained, assign, sublet, or permit the assignment of this Lease, or any interest therein, whether voluntarily or involuntarily, or by operation of law or otherwise. No consent to such assignment shall operate to relieve the Lessee or its successor's interest from the necessity of obtaining like consent for any subsequent assignment.
5. **HOLDOVER:** There shall be no holding over by Lessee upon expiration or termination of this Lease without the written consent of the Lessor, and Lessee further agrees to vacate the Premises immediately upon expiration of this lease or within thirty (30) days upon termination of this lease, whichever may be the case.
6. **ATTORNEYS' FEES:** If any action at law or in equity shall be brought to recover any rent under this Lease, or for or on account of any breach or default of, or to enforce or interpret any of the covenants, terms or conditions of this Lease, or for the recovery of the possession of the demised Premises, the prevailing party shall be entitled to recover from the other party as part of the prevailing party's cost reasonable attorneys' fees, the amount of which shall be fixed by the court and shall be made a part of any judgment or decree rendered.
7. **EFFECT OF SALE OR TRANSFER:** In the event of the sale or transfer of the demised Premises or any part thereof by the Lessor during the term hereof, such sale or transfer shall be subject to Lessee's leasehold interest and all of the terms and conditions of this Lease.

1. **TIME OF THE ESSENCE:** Time is hereby declared to be of the essence of each and every provision hereof, and no waiver of any breach of any condition or covenant shall waive any such condition or covenant or future breach thereof, or this covenant as to time.
2. **NOTICES:** All notices under this Lease shall be in writing and sent by U.S. mail, or may be personally delivered, to the Lessee at \_\_\_\_\_ and to the Lessor at \_\_\_\_\_. Any change in address shall be provided by each party to the other in writing. Notices shall be deemed given as of the date of personal delivery or deposit in U.S. mail.
3. **HEIRS AND SUCCESSORS:** Subject to the provisions hereof pertaining to assignment and subletting, the covenants and provisions of this Lease shall be binding upon the heirs, legal representatives, successors and assigns of any or all of the parties hereto.
4. **PRIOR AGREEMENTS:** This Agricultural Lease contains the whole agreement between the parties pertaining to the Premises, and there are no other terms, obligations, covenants, representations, statements, or conditions, or otherwise, of any kind whatsoever.
5. **NO MODIFICATIONS:** Both parties acknowledge that no representation or condition or agreement varying or adding to this Lease have been made either orally or in writing and further that no modification, addition, or change shall be made or shall be effective unless reduced to writing and executed by both parties hereto.
6. **OPERATORS:** For the purpose of this lease, Lessor recognizes that \_\_\_\_\_ are the operators and owners of \_\_\_\_\_.
7. **SEVERABILITY:** In the event any one or more of the provisions of this Lease is found and determined to be unenforceable by the court of competent jurisdiction, the remaining provisions of this Lease shall nevertheless continue in full force and effect and be binding on the parties hereto, their agents, representatives, and assigns as set forth herein.
8. **GOVERNING LAW:** As the parties acknowledge that the location of the Premises, which are the subject of this Lease, is within the State of Montana, they agree that this Lease is entered into and shall be governed by the laws of the State of Montana.
9. **RECORDING:** The parties agree that neither this Lease instrument nor any abstract thereof shall be filed of public record without the prior written consent of Lessor.

IN WITNESS WHEREOF, the parties hereto have executed this Lease on the day and year first above written.

LESSEE:

XYZ CORPORATION.

A Montana Corporation

LESSOR:

ABC, LLC

A Montana Limited Liability Company

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By: John Doe, President

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By: Jane Smith, member

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## Appendix II. Landowners Interview Overview

Elyse Caiazzo

4/3/2022

CFAC

Landowners

Interviews

### No

#### Why?

- The farm is evolving and no longer looking for help.
- Have another leaser, not from farm link Montana.
- Not looking at this time, never heard a word from land seekers.
- Found someone outside of Farm Link Montana using the greenhouses for a flower farm.
- Had two people reached out and it wasn't successful.
- Town issues?
- Ranch leased – in a great situation outside of Farm Link Montana
- Got it leased not through farm link Montana.

### Yes

#### Contacts?

- 3-5 people reached out.
- Some people talked to but not through farm link.
- Has an add on farm link and through AERO?
- Few bites
- Put some ads on Facebook marketplace and heard through that but never through farm link.
- a couple people came and said they could put up fruit trees and beehives - liked the idea of the greenhouse - but they wanted to know how much we were going to pay for

#### Barriers?

- haven't been reached out to anyone - don't have deer fencing - so potentially invest in fencing.
- mostly leasing - not an option to live on property right now. - no trailer on property
- running into people who don't have equipment, tractor and farming equipment, the ground needs to be broken up and need a place to stay.
- money - financial - sell it - open to other things - primarily looking for someone to buy it for agriculture.
- people that wanted to use the land didn't follow through after initial contact.
- What pushes people away - is the cost of getting production started?
- needs fencing - want to offer 2 acres - neighbors on one side fence - south north side - done by us - neighbor on west side - not cooperating, she wants fencing, the owners would have to pay to put up fence next to neighbors' old rickety fence - 5-foot fence.

- Share the cost with greenhouse - but the risk of people backing out last minute - how committed.

### **Begin farming?**

- not farming it currently
- lived on farm 13 years, and put-up greenhouse that winter, greenhouse with solid sides.
- farmer - all ever

### **Own the property?**

- 2.5 years
- owned 5 years ago - 2 acres of pasture or farmed, another 2-3 acres that a barn sits on for larger animals - run into the whole fencing.
- 14 years owning the property 2007.
- 28

### **Practice options:**

- regenerative agriculture - permaculture - food forest - real production farming, animals running everywhere.
- Hope to have sustainable practices - pasture, veggies, seeds, open to a lot but are looking for someone with environmentally friendly practices.
- 10 acres of hay land - 2 acres of growing - have a large greenhouse - large garden area with flowers, never been able to keep up with a lot of it - garden is pretty intact - goal is to not be responsible for it.
- take over the business - seeds, veggies, orchard, bedding plants, greenhouse.
- proposed into property in LLC - looking for primarily leasing - long term or LLC to share own
- always did themselves but at this point we need someone to take it over with CSA, farmer Market - has a vision for a farm, willing to come on.
- want the farm to be a business for someone else, happy to pass on or share what we have - they don't want to put too much effort into the farm.
- Fence around main garden - not a huge problem deer - so many alfalfas field around us
- building a shop triple bay - build a housing above it, and people could live on trailer and lots of options for housing and open to housing.
- money - financial - sell it - open to other things - primarily looking for someone to buy it for agriculture.

### **Feedback:**

- would love landowner workshops and resources to landowners.
- Whoever is farming the land by the time she is ready to leave would have the first claim to buy property?
- open to conservation easement - has spoken to land trust in the area.

**CFAC Next Steps:**

- Landowner Workshops
- What are some ways we can help with financial barriers?
- We need to connect land seekers to landowners before seeking retirement.

## Appendix III. Land Seeker Survey Overview

Elyse Caiazza

4/5/2022

Land Seeker Survey

Review

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**Responses: 9**

**How many Landowners have you been in contact with, and who initiated the connection?**

- None
- 3-5 contacts, all initiated by the land seeker.

**Are or (were) you searching for land to lease or to purchase?**

- Lease (4)
- Purchase (3)
- Other (2)
  - o Lease or purchase

**If you have not found land yet, what have been some barriers in connecting with Landowners?**

- Out of date postings, lack of options
- Lack of suitable and amount of land
- Not in area of interest
- Current over inflated market
- Never contacted by the landowners
- After sending out many e-mails, we have only received one response. That landowner told us they had a bad experience & were no longer open to mentoring options.
- My personal progress in developing my farm at the smaller property which I am currently farming.
- Nobody in a feasible situation has contacted me, and I don't know how to reach people other than showing up at their doorstep.
- No one got back in contact with me.

**How can we help you to find land?**

- Actively search for more producers
- I'm hoping to get at least 160 ac, with ample water. I prefer to stay along the Rocky Mountain front. If you are aware of any such, I'd appreciate hearing about it.

- In my estimation, the answer to this land crisis for beginning farmers & ranchers must lie in leased land. The land prices make it nearly impossible to begin on anything large enough to feed a family. And the so-called "beginning farmer / rancher programs" through government-based or private lenders require 3 years of proven ag income. Those programs cater to "already established farmers / ranchers." If your program could somehow convince landowners to be willing to lease their ground to actual "beginning" farmers / ranchers, I believe it could redeem this otherwise desperate situation. As things are going now, Montana will eventually no longer be producing ag commodities. Even Montana-based "ag lenders" refuse to finance over \$800-\$1000 per acre for ag land. That is, unfortunately, no longer a reality. Something must change, or beginning producers will end up in other places. And Montana will be left to millionaire hunting properties. What a shame that will be.
- I could use more help/information/support on financial planning for purchasing land.
- I think having more communication with the landowners to remind them of potential land seekers, or trying to match owners with seekers on the back end and then reaching out to the landowners to tell them that there are "matches" that could work.
- Help me find someone who is willing to give me a chance.

**Were you ever contacted by a landowner who felt like a good fit? Please elaborate on your experience.**

- Yes (1)
  - o We had the same ideal regarding farming and through other contacts met in person. However, I am not currently in a financial position to move onto the property, and they were doing herbicide remediation and I need organic land.
- No (8)

**Have you taken any workshops with CFAC or other organizations on business or financial planning? If so, please elaborate.**

- Yes (4)
- No (5)

**What year did you begin farming/ranching?**

- Have not begun farming (3)
- 2019 (1)
- 2018 (1)
- 2016 (1)
- 2015 (1)
- 2012 or before (2)



**What kind of operation are you hoping to have?**

- Livestock Ranch (6)
- Vegetable (1)
- Mixture (1)
- Other (1)

**What additional feedback about Farm Link Montana would you like to share? We truly value your individual stories, and we would love to hear about your experience with Farm Link Montana.**

- With all the families getting out of active farming/ranching but would still appreciate their land being worked, if a pool of such could be gathered it'd be helpful.
- I feel like this is a good program, it's just that no one was interested in me. I've had some training and some experience. I've just never been able to find some land for myself and my cattle.
- From where we are in the eastern part of the state, your program seems to have very little impact. Perhaps it is the long-standing family farms/ranches & unwillingness to allow outsiders the chance to begin. Perhaps the reasons lie elsewhere. Regardless, your program seems to hold great potential. And while it may be working well in Western Montana, it does not seem to be working here.

## Appendix IV. [Farm Link Montana Securing Land Website](#)

Land access is the way farmers and ranchers acquire land to support their operations. It involves land seekers, landowners, real estate agents, service providers, community members, etc.

**There are many different paths to accessing land, such as:**

- Purchasing land
- Inheriting land
- Succession
- Leasing



Land access is one of the primary issues facing Montana's beginning farmers. Land may be unavailable in your community or available but priced out of your range. Either way, it can be a major challenge to starting a farm. In some areas of the country, these challenges are causing farmers to stop looking for land to purchase and focusing solely on leasing. Unfortunately, finding good farmland to lease may be as difficult as finding good farmland to purchase, and comes along with its own set of challenges.

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**However, all is not lost!** Below are some great resources for planning your success:

- **[Module 8: Land Access of Planning for On-Farm Success](#)**

Designed to help you identify ways to find and evaluate land. It will also help you understand the types of arrangements that may be possible and offers tips on how to write a contract that will be good for you and the landowner

- **[Finding, Assessing, and Securing Farmland](#)**

A workbook written for beginner farmers who are looking for land to start a farm business, and it can be best to work through with a farm mentor, or service provider

- **[Explore Farmland Access Toolkit](#)**

Learn about different paths you can take to secure land

- **[A Mini Compendium of resources for Beginning farmers on finding land tenure](#)**

The Greenhorns outlines considerations for landowners, considerations for farmers, and helpful guiding questions for both parties to ask themselves and one another. Look through the table of contents for topics of interest such as "Land tenure Options", "Agricultural Farmland Easements", and "A Lease Agreements Guide for Landowners and Farmers"

- **[Land for Good Toolbox: Land Seekers, Landowners, Farm Transfers, and Leases](#)**

This resource from Land for Good includes a tutorial called "Acquiring Your Farm" that details the process of acquiring land as well as numerous links to other resources; the tutorial section on communication and negotiation is particularly strong.

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## **PURCHASING LAND**

The cost of buying land and paying a mortgage can add to the cost of starting a farming operation. Considering your farm finances is important to beginners getting started and for landowners considering farm transfers. Having a sound business plan is just as important to your success as a sound financial plan. Once you have a concrete business plan with a budget, look into different purchasing options.

- **Cooperative Land Ownership**
  - A [guidebook](#) on collective business models for small and beginning farmers
- **Workers Cooperatives**
  - [What is a Workers Cooperative?](#)
- **Conservation Easements**
  - [Complete Overview](#) on Conservation Easements and different ways to utilize them create by Farmland Access Legal Toolkit
- **Private Contracts**
  - Many property owners are willing to contract directly with a beginning farmers for sale of land, machinery, livestock, or other assets
  - Contracts can range from cash deals to share rent to work in arrangements,
- **Farm Loans**
  - [Montana Beginning Farm/Ranch Loan Program](#) through the Montana Department of Agriculture
- **Local banks**
  - [Northwest Farm Credit Services](#)
  - [Opportunity Bank of Montana](#)

For additional resources, check out our [Traditional Grants and Loan page](#).

## SUCCESSION

Estate planning and figuring out how to transition farm and ranchland to the next generation is probably one of the most challenging decisions a farm family has to make. However, if landowners don't make those decisions, that conversation becomes a whole lot harder once they're gone.

Montana has some excellent resources for estate and transition planning. **Marsha Goetting** at MSU Extension focuses on estate planning, personal and family finance, credit management, and retirement planning. Watch for one of Marsha's great talks or get in touch with her at another resource is the Montana Office of Gift Planning, a project of the [Montana Community Foundation](#). Staff there are available to assist with estate planning when there is an interest in philanthropy and donating some of your family's savings to charity.

Below are a few article and worksheets to help





assist you in your succession plan:

- **Farm Transfers & Retirement Strategies** From the Center for Rural Affairs
- **Passing it on**  
Facilitating farmland transfer to the next generation by Winton Pitcoff
- **Understanding Farm Transition Planning**
- **A Transition Planning Inventory**  
Developed by Oklahoma State University to help you go through the many aspects of your personal assets and business assets.

## LEASING LAND

While land ownership has the obvious benefits of allowing you to build soil and investment in a piece of property over time, there are some definite benefits to leasing land as well.

1. Typically a cheaper way to access land
2. Allows you to evaluate an area – soil types, irrigation district, and farming community without the commitment of land ownership. If you find that the region's climate isn't working for you, it's a lot easier to pick up and move if you're leasing.
3. Allow you to just get started, beginning to build profits, brand visibility, and experience while you search for the land you'll buy
4. Help you build up to the three years of management experience you need to apply for Farm Service Agency [farm ownership loans](#).

However, leasing is not without its challenges. Probably, the foremost challenge is writing a lease that protects you and the landowner equally.

- **Lease writing is to get clear on goals – yours and the landowners.**  
Develop a written lease agreement that combines the goals and resources of the owner and tenant into a package.
- **The agreement should encourage use of the optimum levels of technology, capital, labor, and management for profitable operation of the farm.**
- **Consideration should also be given to yield and price risk and who will bear them.**  
The division of risk is key in determining what kind of lease is acceptable to both parties.

### **CFAC's Landowners Guide to Leasing**

This resource was developed by CFAC to help guide landowners through the leasing process.

### **Using Leases to Meet Financial and Stewardship Goals**

This resource from the Farmers' Legal Action Group covers the pros and cons of leases versus buying, landowner benefits of leasing, basic requirements and terms, and how to structure leases to encourage or require the use of sustainable practices.

### **Farmland Changing Hands: A Study of Innovative Land Transfer Strategies**

A guide put together by Washington Farm Link and the Cascade Harvest Coalition. The guide highlights projects and strategies for land transfer, tenancy, and ownership that have good potential for increasing land access among beginning farmers.

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### **Affording Our Land**

Created by The Greenhorns, chapter 2 of this resource, "Land Tenure by Leasing," outlines not only the elements of a good lease agreement, but also reasons one might benefit from leasing as opposed to owning land, general information about the leasing process, and an overview of different lease types.

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### **A Landowner's Guide for Leasing Land for Farming**

This is a comprehensive resource from Land For Good which, specifically in chapter two, explains the benefits of leasing land from the perspective of the landowners. It also provides an overview on successful landowner-tenant relationships (chapter 6) and leasing information (chapters 7 & 8).

### **TYPE OF LEASES & SAMPLES**

\*These documents are not intended to take the place of legal advice\*

#### **Iowa Farm Lease**

This document serves as a template for developing an agreement to fit a leasing situation. While formulated for leasing in Iowa, this detailed resource outlines options for cash rent, flexible cash rent, and crop share agreements, and would be best utilized as a starting point from which land seeker and landowner could pick and choose what is most compatible with their situation.

#### **Model Agricultural Ground Lease**

This PASA document serves as a template for leasing land in the model of a ground lease. An agricultural ground lease is an agreement through which a tenant is permitted to develop a piece of property during the lease period, after which the land and all improvements are turned over to the property owner. In this model, ownership of the land is typically separated from ownership of buildings on the property.

### **Short-term Lease Agreement**

This Land For Good document serves as a template for leasing land for one or two seasons. Note at the end of the document there is a list of potential forms to include as attachments.

### **Multi-year Lease Agreement**

This Land For Good document serves as a template for leasing land for two or more years.

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### **Long-term Lease on Public Land**

This Land For Good document serves as a template for leasing farmland on public land.

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### **Crop Share Lease agreement**

This Land For Good document serves as a template for leasing land, specifically in the crop share model. While specific to the crop share model, this resource could also lend helpful language to other leases created for other models.

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### **A Written Lease or Agreement – Step by Step**

The main goal of a lease is to develop a fair agreement understood by both parties. This step by step guide will help you identify what "should" be in your agreement.



## **LEASE RATES**

### **Cropland and Livestock Leasing in Montana**

If you're interested in learning more about Crop Share Leasing or Livestock Leasing, check out this short presentation by George Haynes of MSU Extension.

### **Planning for On-Farm Success, Module 8: Land Access**

Pages 7-9 of this Farm Link Montana resource outline a comprehensive overview of negotiating lease rates for various types of leasing.

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### **How to Determine the Right Farm Rental Rate**

Created by the University of Vermont Extension, this guide supports farmers and landowners through the process of determining a fair cash rental rate for farmland, equipment and infrastructure. Pages 3-5 of this resource also includes a step-by-step guide outlining how to use the National Agricultural Statistics Service (NASS).

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### **National Agricultural Statistics Service**

This customizable, searchable database allows you to manipulate variables in order to view statistics on average lease/rental rates by county in Montana and in other states. Another feature of this service is located on the [main page](#) under the publication tab, and allows you to search for papers published by highly reputable sources on agricultural topics, including lease rates.

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### **Farm Leases and Rents**

This UC Davis resource outlines the types of leases as well as advantages and disadvantages for each. There are also two sample budgets to help with determining cash rent, and a leasing checklist at the end.

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## **NEXT STEP – COMMUNICATION**

No matter what direction you take to secure land, communication between landowner and land seeker is imperative! Below are some great resources for negotiation and maintaining a good owner-tenant relationship.

- **Managing Landlord-Tenant Relationships**
- **Communicated Effectively – Making Meetings Matter**



## Appendix V. [Farm Link Montana Landowners Website](#)

**If your goal is to see your land farmed or ranched, Land Link Montana is for you! Land Link is designed to assist you in finding a farmer or rancher who will be a good fit for you and your land.**



**We recognize that every landowner's circumstance is unique, and we work with all types:**

- Retiring farmers and ranchers looking to pass their land on to the next generation of producers
- Non-agricultural landowners looking to lease some of their land to a farmer
- Farmers and ranchers approaching retirement looking to mentor and/or partner with a beginning farmer or rancher

## WHAT YOU CAN DO

- **Where Do I Start Worksheet** – Fill out a short worksheet focusing on big picture thinking and goals.
- Review the information on this page to build your understanding of the program and to ensure your listing includes all the important information.
- Browse **resources** for education and planning farmland access, tenure, and transfers.
- Create an account and fill out a **Landowner application**.
- Search for farm seekers in the **Database**.
- Once connected with a potential farm seeker – **Secure the Land**.



## HOW CAN WE HELP

- Provide support with lease-writing – however, all land decisions are solely made between you and the land seeker.
- Provide workshops and trainings.
- Help with other potential challenges that arise.
- Sign up for our monthly **Farm Link e-newsletter** to receive updates on new land listings.

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## THE APPLICATION PROCESS

To create a listing in the Land Link database:

1. Read through the **Land Seekers** page to learn about what we're asking for from them.
2. Create a Farm Link account and fill out the **Landowner application**
3. Read through the FAQ section on the **Land Link Page**
4. Complete the application as thoroughly and thoughtfully as you can. May take us 3-5 business days to review your application to ensure that all of the questions have been answered.
5. If your application is approved, we will send you an email notifying you that your listing is live and giving you the link to it so that you can share it with potential land seekers, friends, and family. As noted above, from this point on the process is primarily up to the land seekers, although you can search the database for land seekers as well
6. Once you've made a match in the program through a lease or purchase of property, please contact **Mary** to let us know so we can remove your listing and celebrate your success!



## TIPS FOR MAKING A MATCH

What's the key to a successful land match?

**Your story!** Landowners turn to Land Link over other real estate services because they care about the land, and they want to make a connection with someone who will be a good steward. Land seekers turn to Land Link for the same reason: **to make a meaningful connection.**

**As a landowner, use your profile to:**

- Pin your farm on the map
- Tell your farm's story
- Describe your vision for the land
- List the farm's characteristics
- Upload photos of the land and/or buildings



**Some things to consider when viewing profiles:**

- Range of things you might be open to and types of farming to which you are completely opposed.
- Remember that the narrower your vision for your land, the more limited the pool of potential land seekers will be.
  - Think about the things that are important to you about how you use your land.
- Make sure that your expectations are appropriate for the types of farming you're open to.
  - Farmers and ranchers make fantastic neighbors, but it's a good idea to think carefully through your needs and expectations and make sure you find a match that fits them well.



**When you are contacted by a land seeker, remember to be:**

**Patient and open-minded with them!** Typically, in our country, we access land through intermediaries – realtors – and it takes a leap of faith to call a landowner on the phone. While we encourage them to have a carefully prepared pitch ready for their call to you, there's a chance that they will be nervous and may have a hard time explaining their plans. They also may try to be humble and may not be prepared to tell you about all of the experience they have. We encourage you to try to meet in person so that you can get a better sense of them and whether you might make a good fit for each other. Feel free to ask lots of questions when you meet and make sure that your needs and expectations will be met by any arrangement you enter into.

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**FINE PRINT**

CFAC does not vet or endorse Land Link participants. It is the responsibility of the land seeker and landowner to safeguard themselves by clearly defining and clarifying expectations, checking references, and asking questions. CFAC is not a party to any land agreement and the terms of any agreements should be considered private agreements between the land seeker and landowner only.

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## Appendix VI. [Farm Link Montana Land Seekers Website](#)

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If you are looking for land to farm or ranch, Land Link is designed to assist you in finding the farm or ranch that might be a good fit for your agricultural goals and individual situation.

**Free of Charge!**



### WHAT TYPE OF LAND SEEKER ARE YOU?

- Beginning farmer or rancher looking to start an agricultural business by leasing or purchasing land
- Well-seasoned producer looking to re-locate or expand an existing commercial operation
- Aspiring farmer or rancher looking to partner with and/or be mentored by another producer — perhaps a retiring farmer or

### IN ORDER TO QUALIFY AS A LAND SEEKER, YOU NEED TO:

- Have at least two years of experience working on a farm or ranch or gaining equivalent education through a college degree
- Must be looking for land to support commercial agriculture

**If you have dreams of farming but currently lack experience or education, we encourage you to find a job on an operation where you can pick up the necessary skills to be successful.**

- Check out Farm Link Montana's [Work Link Program](#) to find Montana farm work opportunities

- Join CFAC's **Certified Farm Startup Program**
- Look for farm employment on Craigslist
- **Montana Job Service**
- Check out work opportunities on NCAT's **ATTRA** site

## WHAT YOU CAN DO

- **Where Do I Start Worksheet** – Fill out a short worksheet focusing on big picture thinking and goals
- Review the information on this page to build your understanding of the program and to ensure your listing includes all of the important information
- Browse **resources** for tools to structure your business and finances
- Create an account and fill out a **Land Seeker Application**
- Search for farm properties in the **Database**
- Once you have found a piece of land – **Secure the Land**



## HOW WE CAN HELP

- Provide support with lease-writing – however, all land decisions are solely made between you and the landowner
- Help with your pitch to Landowners
- Production and Business Planning support through out **Certified Farm Startup Program**
- **One on One Business Development Assistance**
- Help with other potential challenges that arise
- Sign up for our monthly **Farm Link e-newsletter** to receive updates on new land listings

## APPLICATION PROCESS

**To Create a listing in the Land Link Database:**



1. Read through the **Info for Landowners** page to learn about what we're asking for from them
2. Create a Farm Link Account and fill out the **Land Seeker application**
3. Read through the FAQ section on the **Land Link Page**
4. Complete the application as thoroughly and thoughtfully as you can. It may take us 3-5 business days to review your application to ensure that you have 2 years of experience and are planning on using the land you find on the site to start a commercial agricultural enterprise
5. If your application is approved, you will have access to the landowner's contact information within 5 business days.
6. From this point on in the process it is up to you! You can look for properties as often as you like
7. You can update your listing at any time and are expected to at least annually to verify that you are indeed still looking for land. This will ensure that the listings on our site are fresh, current, and accurate.
8. Once you've made a match in the program through a lease or purchase of property, please contact **Mary** to let us know so we can remove your listing and celebrate your success!

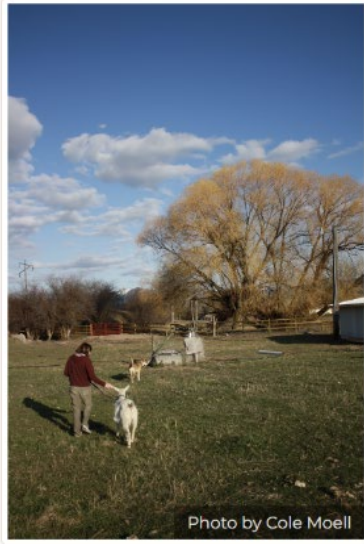
## TIPS FOR MAKING A MATCH

What's the key to a successful land match? **Your story!** Landowners turn to Land Link over other real estate services because they care about the land, and they want to make a connection with someone who will be a good steward. Land seekers turn to Land Link for the same reason: **to make a meaningful connection.**

### As a Land Seeker, use your profile to:

- Describe your farming goals
- List your values
- Details your farming experience or qualifications
- Upload photos of yourself, your family, or something that supports your farm experience and adds a personal touch
- Describe your desired farm characteristics





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#### **FINE PRINT**

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## Appendix VII. Site Assessment Slide Show

### Slide 1



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### Slide 2



Intern at CFAC for spring 2022

Intern at One Montana LEARN project 2022.

Born and raised in Maine.

Farming for 8 years

**Agroecology class** - did a site assessment on a farm in the rattlesnake and will be explaining my process as we go through what exactly you should be looking at in your site assessment of your own land or potentially utilized land.

### Slide 3

## Overview

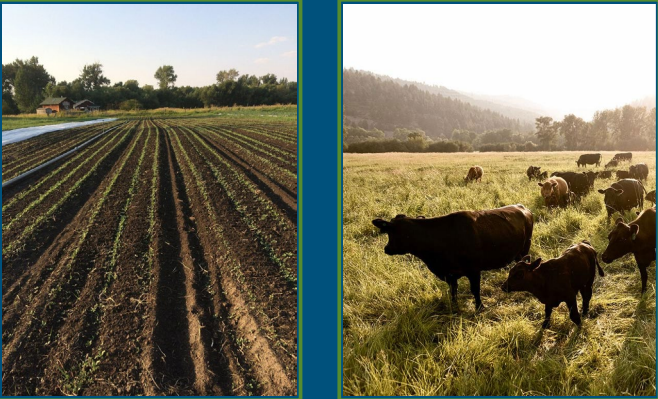
- Ranching vs. Farming
- Climate & Weather
- Soil
- Infrastructure
- Water
- Wildlife
- Zoning
- Organic Certification
- Leasing
- Your Land & Community

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### Slide 4

## What to look for based on Your Operation

- Land Use
- Soil
- Water
- Infrastructure
- Community



pasture lands are diverse types of land where the primary vegetation produced is herbaceous plants and shrubs. These lands provide forage for beef cattle, dairy cattle, sheep, goats, horses, and other types of domestic livestock. Also, many species of wildlife, ranging from big game such as elk to nesting songbirds depend on these lands for food and cover.

Ranch Site Assessment

- Amount of Land - may not need a lot of land with rotational grazing, regenerative grazing
    - does require more time and effort but less money for land and may be a better way to have ecological benefits.
  - Water Rights
  - Infrastructures
    - Fencing
    - Barn
  - Soil quality and Contamination
  - Land Use
- Farmer Site Assessment
- Turning over land
  - Water rights
  - Irrigation
  - Infrastructures
    - Deer fencing
    - Barn or pack shed.
  - Soil Quality

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**Slide 5**



# CLIMATE & WEATHER

## Slide 6

### Types of Weather Data

- Topography
- Light
- Temperature
- Precipitation
- Wind



Remedy farm - sits right next to jumbo so day length was a concern for us on the shoulder seasons.

**Topography** - elevation, slope, aspect, land should be flat enough to be opened up, or for precip to not affect soil or plants, however this is not as important if grazing livestock, but identifying.

**Light** - day length at equinoxes and solstices, light impediments such as hillsides, structures

**Temperature** - Hardiness zones and last and first frost date to determine length of growing season, monthly average highs, and lows.

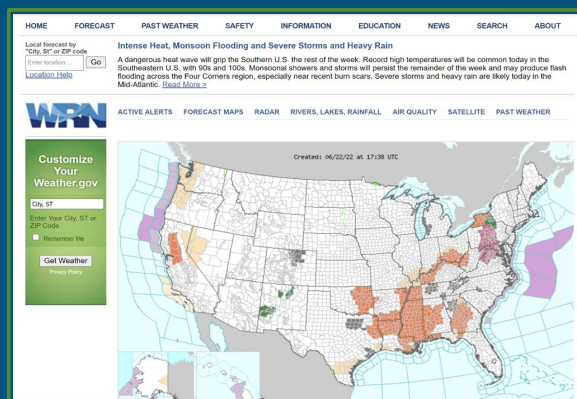
**Precipitation** - average precip., monthly precip. and knowing your dry and wet seasons based on your location.

**Wind**: average wind speed and direction especially when in a rural area with spraying

## Slide 7

### Where to find climate and weather data

- *Weather.gov*
- *Noaa.gov*
- *Usgs.gov*
- *Usda.gov*
- *other regional climate websites*
- *sunroof.withgoogle.com*



Slide 8

## Remedy Farm Example

Average Annual Rainfall	13.5 - 14.1 inches
Average Annual Snowfall	37 inches

Season/Month	Average Wind Speed (mph)	Direction
Winter/January	4.5	West/Northwest
Spring/March	4.4	West
Summer/July	4.0	West/Southwest
Fall/October	4.3	West/Northwest

Month	Average Precipitation (inches)
May	2.01
June	1.95
July	0.99
August	1.19
September	1.17

Month	Temperature Range	Average Temperature
May	38-67 °F	52.5 °F
June	47-75 °F	61 °F
July	51-86 °F	68.6 °F
August	50-85 °F	66 °F
September	42-73 °F	56.5 °F

Remedy farm - sits right next to jumbo so day length was a concern for us on the shoulder seasons.

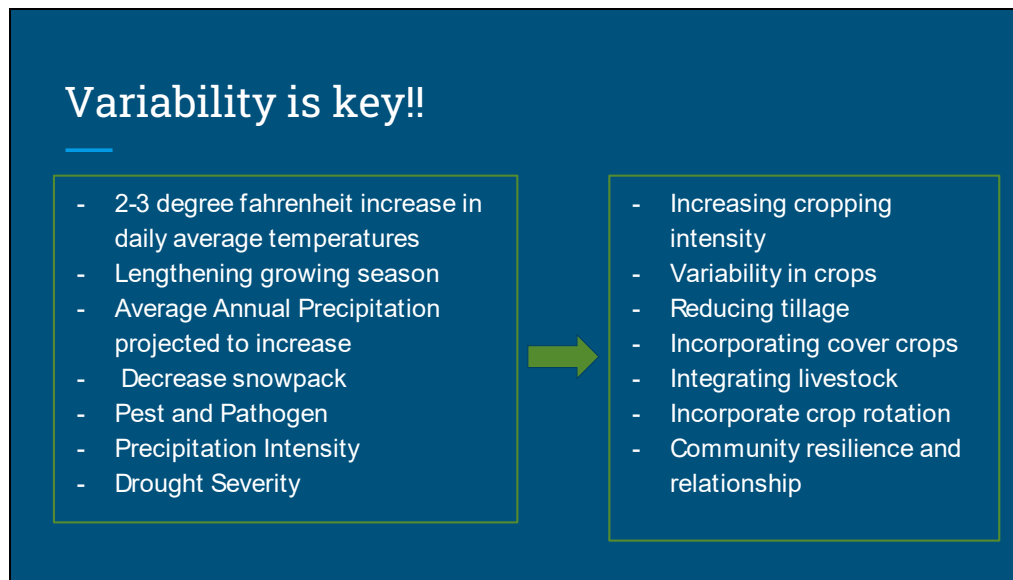
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Slide 9

# CLIMATE CHANGE

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## Slide 10



- Between 1950 and 2015, Montana saw a 2-3° Fahrenheit increase in daily average temperature.
- 21<sup>st</sup> century, where temperatures in Montana are projected to rise between 4.5 to 6.0° Fahrenheit by 2050
- For some areas in Montana, this rise in temperature will be favorable for crop yields, at least in the short run.
  - prevalence of pathogens
- It will increase the number of frost-free days and lengthen the growing season slightly (Silverman et al. 2017). This is already occurring as records show that the growing season in Montana has lengthened by 12 days between 1951 and 2010.
- average annual precipitation is projected to increase.
- increase nutrient cycling and crop yields (Wienhold et al. 2017). This is especially true for crops such as wheat, dry edible beans, hay, barley, and corn which are currently grown under water stressed conditions.
- more precipitation will fall as rain instead of snow.
- Reduced irrigation capacity will have the greatest impact on hay, sugar beet, malt barley, market garden, and potato production.
- Precipitation intensity increase
  - Runoff, leaching, soil erosion, degraded water quality
- Drought severity = severe wildfires

## Slide 11

# SOIL

## Slide 12

### How to Sample Soil

- Timing
- Depth
- Location
- Number
- Sample Handling
- Labs



The worth of soil testing depends on:

- selecting a sample representative of the field, which includes choosing the right sampling time and location,
- correct sample handling,
- the quality of the diagnostic lab testing the soil, and,
- providing a realistic yield goal for the lab to base fertilizer rate recommendations.

Timing - late summer to late fall for good soil conditions - gives good example of soil conditions postseason with nitrogen, pH, SOM, and CEC

Depth - Pasture samples to 12 inches deep and annual crops to 6 inches





## Slide 14

### Examining Soil Tests

Divide into groups of 3 or 4

Examine soil test in front of you:

1. What is the Soil Organic Matter (SOM) content? What does that tell us about this soil?
2. What is the pH? What does that indicate about this soil?
3. What is the Cation Exchange Capacity (CEC)? What do those numbers tell us about this soil?
4. Among the different fields at the PEAS Farm, are there any areas of high soil quality? Areas of low soil quality?

**SOM** - around or above 5% allows for more pore space for soil microorganisms to thrive, allows for root growth, and diminishes compaction.

**pH** - ideally 6.6-7.1, if acidic add lime to raise pH, limits nitrogen fixation

**CEC** - Nutrients in soil are ions with positive or negative charges, high CEC means the soil has better ability to hold and exchange cation between soil and plant roots,

1-10 is high sand content.

11-50 is high clay content.

Agricultural ideally is around 25 or above.

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## Slide 15

Soil Types	Benefits	Drawbacks
Clay dominant	<ul style="list-style-type: none"><li>• Holds water well</li><li>• Holds and exchanges nutrients well</li><li>• Desirable in arid climates</li><li>• Desirable for crops with high water needs</li></ul>	<ul style="list-style-type: none"><li>• Can become compacted</li><li>• Challenging in wet climates</li><li>• Vulnerable to plow pan development</li></ul>
Sand dominant	<ul style="list-style-type: none"><li>• Porous to water, good drainage</li><li>• Less vulnerable to compaction</li><li>• Desirable in wet climates</li><li>• Easier for mechanized systems</li><li>• Desirable for crops with large root systems, with fewer water needs</li></ul>	<ul style="list-style-type: none"><li>• Less able to hold water</li><li>• Less able to hold nutrients</li><li>• Vulnerable to nutrient leaching</li></ul>

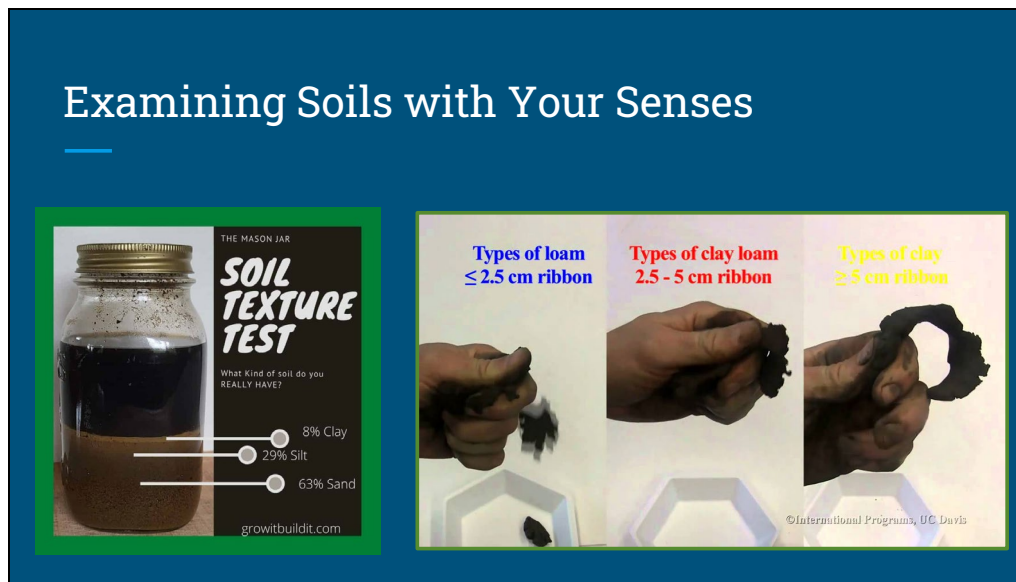
Like Patrick covered in his Soil Workshop, loam types can be claying dominant and sand dominant, and each have benefits and drawbacks. If you are looking for more information about your land and soil, you should look into these two sources.

**Web Soil Survey:** <https://websoilsurvey.sc.egov.usda.gov/App/HomePage.htm>

**UC Davis Soil Web:** <https://casoilresource.lawr.ucdavis.edu/gmap/>

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## Slide 16



**Visually** - what does your soil look like? What are the colors you see, are worms present, using the mason jar test will help you determine your loam percentages?

**Feel** - rocky? Sandy? Fluffy?

Using the ribbon test and help one feel and test the clay content in your soil.

**Smell** - active decomposition - earthy smell

**Slide 17**

# INFRASTRUCTURE

**Slide 18**



Depends on what operation you are doing, but infrastructure could be housing, deer fencing, livestock fencing, high tunnels, animal barns, equipment storage, etc.

But more importantly, if you are leasing, the conversation of usage of those infrastructures, who pays for improvements and maintenance are all things to consider when looking at land.

When owning or buying land - recognizing the quality and care of the infrastructures and what sort of maintenance or how much money it will take to bring those buildings up to code. For some counties, agricultural zoning has different codes based on the ag business use of the building or land - we will get into zoning later in the presentation.

**Slide 19**

# WATER

## Slide 20

### Water Access

- Water Rights
- Water Testing
- Irrigation
- Ditch Assess
- Wells



- **Water rights** for any operation and should be able to get information from previous landowner or through the city or state.
- **Water testing** - if on city water, you can get a report through the city, but if in more rural areas, work with an extension agent on how to get a testing.
- **Ditches assess** - who is above you and what are they doing on their land or allowing to flow in their ditch?
- **Wells**- if there is a well on the property, what the depth and or whether you can dig for a well on the land - usually involves applying for a permit.

- **Information should be obtained about seasonal fluctuations in water availability and share or alternative uses of potential water resources.**

\*\*\*\*\*Talk to neighbors, talk to the water district, and current landowners to get the most accurate and helpful information

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## Slide 21



## Slide 22

**Wildlife Considerations**

**Are there any wildlife threats to your operation?**

- Posing a threat to your stock
- Affecting vegetable yields



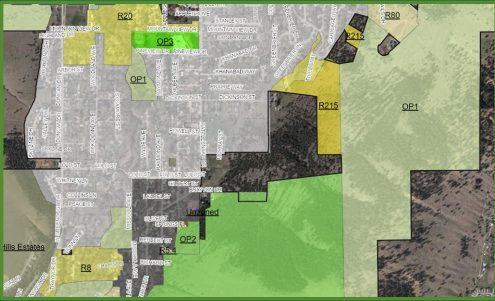
- These are their habitats as well, but wildlife can be detrimental - fencing can be super important, especially keeping out wildlife from vegetable farms.
- Fencing can be expensive but help protect your investments.
- Wildlife - finding a way to coexist.
- Remedy farm wildlife threats and deer fencing

## Slide 23

# ZONING

## Slide 24

### Zoning Considerations



Effective April 11, 2017

MISSOULA COUNTY ZONING REGULATIONS

**SECTION 2.06 C-A1 AGRICULTURAL / OPEN AND RESOURCE**

**A. Intent**  
This classification encourages the continuing use of land for recreation and natural resource production; protects open lands not capable of supporting urbanized development due to biologic, physiographic, or hydrologic constraints; protects open lands from untimely urbanized development which tends to hamper sound resource production and to increase expenditures of public funds for supplying public services. Planned unit developments and planned variations are encouraged to preserve agricultural land and enhance environmental amenities found in rural areas.

**B. Space and Bulk Requirements**

Maximum residential density	One (1) dwelling unit per forty (40) acres
Minimum lot width	One-third (1/3) of its average depth
Minimum required setback	front Fifty (50) feet side Fifty (50) feet rear Fifty (50) feet

See Section 3.06 C. for Accessory Structure setbacks  
Maximum building height.....None

**C. General Standards**  
See Supplementary Regulations - Chapter 3

**D. Permitted Uses**

1. Single-family dwelling; mobile homes constructed prior to June 15, 1976, must be placed on a minimum of five (5) acres with fifty (50) foot front, rear, and side yard setbacks
2. Day care home
3. Guest ranch
4. Agriculture, including any and all structures or buildings needed to pursue such activities
5. Intensive agricultural operation, including commercial feed lots and poultry farms on lots of forty (40) acres or more
6. Open space land
7. Public utility

Knowing what your land is zoned for and what operations are allowed on your land and what the scale can be - such as low intensity or high intensity, farm stands, community involvement, infrastructures up to code.

- Reach out to your local zoning and planning office or zoning map and guide, the city is willing to answer questions.

## Remedy Farm Example Slide 25

# ORGANIC CERTIFICATION & CONTAMINATION

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## Slide 26

### Organic Certification

- Not Required if not labeling food organic
- Fees depend on Gross Sales
- Contamination Testing
- Meeting the National Organic Program Standards
- Marketing Tool



chrome-extension://efaidnbmnnnibpcajpcglclefindmkaj/https://www.ams.usda.gov/sites/default/files/media/DoINeedToBeCertifiedOrganicFactSheet.pdf

## Slide 27

# Contamination and How to Avoid it



Communication with Neighbors and Buffer Zones

Buffers are written into the organic system plan and checked yearly or after a contamination event to ensure that they are adequate. The organic producer determines the adequacy of buffers, and some choose to cut into their growing space to have larger buffers, while others keep them minimal to grow more cash crops. One producer discussed 20 discussed their five- 40 feet of buffers, while another foot buffers (Mike and Charlie). Buffers zones are often trees, shrubs, or 12 acres 81crops that will not be sold but instead grown for protection. If a contamination event happens

These regulations address soil quality, soil amendments, pest management, weed management, and ensure that there have been no prohibited substances on certified crops or fields (USDA). Banned substances include chemicals found in synthetic pesticides. It is important to note that these are banned for certified organic producers but are used quite often in conventional agriculture (Andrews and Rose 2018). Synthetic pesticides can often decrease diversity on farms, kill beneficial insects, and lead to depleted and degraded soils (National Institute of Food and Agriculture). When a producer applies synthetic pesticides to a field, some might drift, however in the wind onto other producers' crops or fields in organic production. Drift, r, is not the only way that pesticide contamination takes place. Accidental or unintentional contamination can also happen through groundwater and runoff. Pesticides can concentrate in water supplies or rainfall and persist in soils long after application.



## CFAC Leasing Guide



# CFAC

<https://www.farmlinkmontana.org/wp-content/uploads/2022/06/CFAC-Leasing-Guide.pdf>

### Considerations:

- Realtor
- Building a strong relationship
- Good Communication
- Asking those tough questions
- Tenure security
- Always get it in writing



Whether a lessor or lessee - doing a site assessment helps show that the property is right for you or how to market the property to the right farmers

Drop in chat.

- [chrome-extension://efaidnbmnnnibpcajpcglclefindmkaj/https://www.farmlinkmontana.org/wp-content/uploads/2016/10/FarmSiteAssessment17.03.pdf](https://www.farmlinkmontana.org/wp-content/uploads/2016/10/FarmSiteAssessment17.03.pdf)
- <https://aglease.msuextension.org/>

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## Slide 29

## Determining Contamination

- Testing
  - Soil
  - Ground water
- Talk to previous owners



Lab tests for soil and groundwater - can be very costly as well to flush the contaminants out of the soil but it is best to check for those contaminants, whether it be herbicides or pesticides because they could inhibit you being certified organic and or the progress of growth on your farm or ranch.

Montana Department of agriculture and the MSU ag experiment station test for feed, fertilizer, pesticide, hemp, and groundwater protection from soils

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### Slide 30

## Your Land and Community

Consider what your land needs  
and what your local community  
needs

- Listening to your land
- Understanding
- Getting to know the community relationships
- Market Research
- Building Good Will



Listen to the land - try to work with it, as you have done your assessment and recognized all the uniqueness of it all - think about what would be best to grow, produce, or what operation would be best on your land - don't try to fight with it, it will make the whole process so much longer and difficult.

As well as considering what your community needs - market research.

Knowing your land - understanding that this is not an overnight endeavor - takes time especially building your land up and creating a strong market connection.

Remedy farm - rattlesnake area, great community space, orchard unable to be economically viable but great for u pick, berries are wonderful for the market - soil is great for berries, and berries are hardy to changing temperatures, also u pick!

#### ***IV. One Montana's Landowner Education and Resource Network Report***

In 2022, I planned, researched, implemented, interviewed, and reported on my experience and findings for the One Montana Landowner Education and Resource Network (L.E.A.R.N) research. One Montana works to “create a sustainable and resilient Montana by identifying and resolving challenges that impact our state’s diverse communities. Challenges include social, economic, community, and environmental issues” (One Montana 2023). One Montana works to strengthen and unify Montana communities by preserving the values and culture of rural and urban Montana. They value collaboration as the most promising way to address the difficult issues of today’s agricultural climate. They regard strong operating partnership to assist in the execution of programs that create impacts and identify solutions from research-based programming. One Montana’s model brings people to the table, assembling people with different backgrounds and perspectives who have shared interest in solving challenges (One Montana, 2023).

The Landowner Education and Resource Network (L.E.A.R.N) is One Montana’s program to provide tools, resources, and case studies to help support private landowners to sustain profitable working lands and prepare for succession. L.E.A.R.N connects information to operations. The first goal of the project was to aggregate existing content focused on succession planning that is readily available but hard for landowners to locate and use. Phase I of L.E.A.R.N began in 2021 by exploring opportunities to provide the tools, resources, and case studies to help prepare and support private landowners to be able to hire emerging leaders, expand operations, start new enterprises, and prepare for succession. Through research, we found an abundance of financial tools and resource options. Rather than recreate content, we believe an aggregation of content is

needed. An aggregation allows landowners easier access to a wide variety of information including tools created by groups like the Western Landowner Alliance, New Agrarian Trust, Land for Good, Quivira Coalition, Holistic Management International, and many others. These tools aggregated into one easy-to-use interactive digital platform would support organizations who created the tools and landowners needing valuable information.

Phase II of this project explored the development of L.E.A.R.N.'s goals, specifically identifying if there is a need for an "online information tool" for landowners to assist with succession challenges. Three parts were explored: functionality, content, and partner relationships. Phase II included:

- Research and Data Gathering
- Expanding Conversations with Potential Partners
- Conducting Interviews and Surveys for Potential Partners and Users
- Looking into Long Term Budget Needs
- Thinking through how to make this platform sustainable for the long term.

The objectives of Phase II research were the following: to identify and consolidate the different resources for succession planning in the United States, to find different resource and tool formats that have been successful elsewhere, and to identify and clarify what barriers that exist for landowners wanting to create a succession planning. During summer 2022, a fellow graduate student and I interviewed a variety of stakeholders such as nonprofit organizations, government agents, farm succession mediators and facilitators, land trusts, and agriculture producers.

Initially interviewed participants were primarily recruited through One Montana affiliates and connections from ranching network conferences, with a reliance on snowball sampling after

initial contacts were established. Snowball sampling is a recruitment technique in which research participants are asked to assist researchers in identifying other potential subjects. It is considered a useful method in the context of the study and the target audience (Parker, Scott, and Geddes 2019). Many other stakeholders were contacted via the cold call method. This method involves researching relevant organizations to our project, finding a staff member to email or call, and setting up a good time to speak if that moment was not a good time. We reached out to individuals at organizations nationally known for their work in farm succession. The person contacted had a job title along the line of communication director, education director, and or farm program director. Most individuals responded with enthusiasm to speak on the matter. I rarely heard back from organizations with general contact forms. The nature of the conversations was relaxed and fluid as we did not want to make the interviews feel like a survey or questionnaire. I personally wanted to feel connected with the interviewee and allow them to express their opinions in whatever way they felt comfortable. Certain questions were asked, but most questions were answered naturally. I transcribed notes as I listened to stakeholders passionately speak on succession planning barriers, successes, helpful tools, and financial resources needed to endure the process. In some cases, the banter surrounded new ideas and topics for aging ranchers to connect with the younger generation on land access and mentoring.

The major theme that emerged was a need for aggregated resources and tools easily accessible to a variety of users including organizations and producers. My biggest takeaway from the interviews was the need for a professional to help with the more emotional and conversational steps in the family farm succession process. I found myself drawn to this role and really enjoyed my time speaking to ranchers overstating the need for more facilitation or even a trusted outside source to talk through forms, disputes, financial hardship, and the emotional attachment to their

land and business. Individuals who concentrate on succession planning facilitation and mediation are either private experts or extension agents such as Elaine Froese from Canada and Marsha Goetting from MSU extension. Organizations in these realms are mostly farmland trusts or community land trusts working to keep farmland in production such as CFAC, Washington Farmland Trust, and Holistic Management Training.

This project helped deepen my knowledge of farm succession planning and land transition efforts. Many organizations want to be a participant in the solution for land access, but the solution cannot be solved by one organization. Through collaborative efforts, organizations can utilize their employees' skills for mediation, facilitation, and education outreach by connecting landowners to the many tools and resources accessible across the country. The hardest part about farm succession planning is accountability. Once resources and tools are made accessible to families, the ball is in the family's court unless they acquire professional facilitation help.

### ***Reflection***

Working for One Montana was a great experience because we had set scheduled meetings with Sarah Tilt, the Director of One Montana, fellow graduate student, John Curnyn, and sometimes, a community resilience mentor, Kelly Beevers. Each meeting had set agendas and goals for the next two weeks. I found myself in the driver's seat for most of the meetings and in other administrative work such as organizing our database, Airtable, creating contact lists, and initiating check-ins with my research partner. The research process was hard at times when people would initially respond to emails but never follow up. I understood that my email and questions were not always at the top of individuals' "to do" list. I think cold calls and emails were a successful tactic in collecting information and initiating connections, but at times, I felt like a burden to individuals' busy day. I would prepare diligently for meetings, making sure to read

about the organization's work, the individual's role at the organization, and prepare questions relevant to their organization. A few times, the individual was abrupt and lacked interest in the conversation. I had to remind myself to not take it personally, and to reflect on how I could have approached the conversation better.

When creating the report, I did a fair amount of research as I was already working on the succession planning literature review and found myself more passionate about the topic.

Collaborating on a written report required a lot of back and forth between the other graduate student and the Director. I tend to find myself in the leadership role for projects, which I think is a good quality for a future employee entering the professional workforce. Overall, I felt supported by the leaders in the organization and made many valuable network connections through the many conversations. This internship and research taught me valuable teamwork skills, interview skills, the power of collaboration, and the ability to learn by listening.

I felt personally connected to this topic through my own experience with family business transitioning. The topic can be a particularly sore subject for the individuals who dedicate their lives to their business and passing down a company can feel more personal than professional. The whole process of succession planning entails many steps and many conversations surrounding ownership/management succession, estate planning, inheritance, and retirement to name a few. As someone who is passionate about foraging a thriving food system in America, I never thought about the importance of land transitioning. Land transitioning is equally as important as land access for younger, aspiring farmers. I have learned that transitioning working lands to other working hands requires more than a handshake.

## *References*

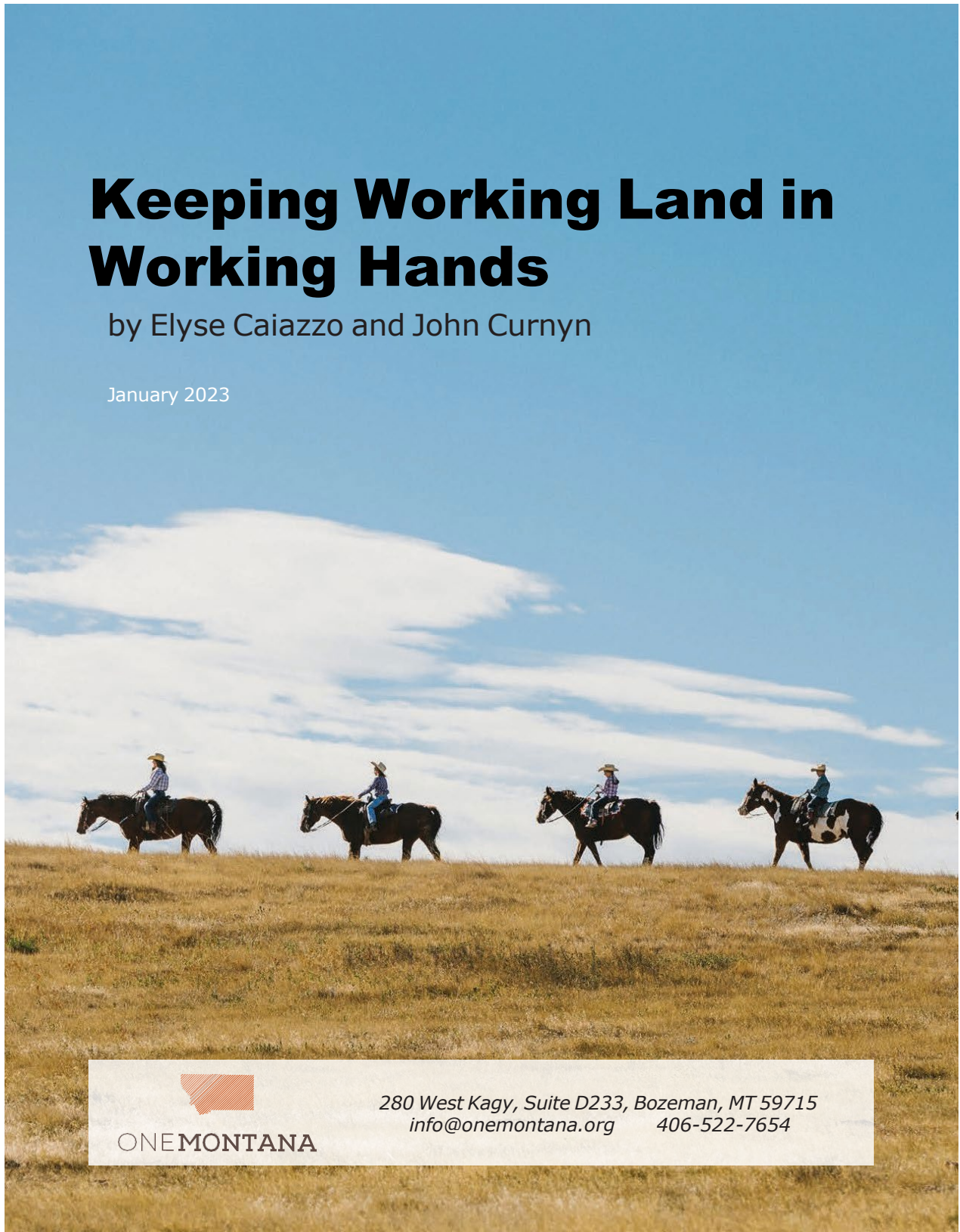
“About Us,” One Montana, accessed February 19, 2023, <https://www.onemontana.org/about-us>.



# **Keeping Working Land in Working Hands**

by Elyse Caiazza and John Curnyn

January 2023



**ONE MONTANA**

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## PURPOSE

One Montana is a nonprofit dedicated to sustaining a vibrant Montana by connecting our rural and urban communities.

In 2021, One Montana began exploring opportunities to provide tools, resources, and case studies to help private landowners prepare for succession. We researched many of the tools and resources already available for succession planning and found an abundance of financial tools and resources, and conservation options. We aggregated this information into a database and compiled seven designs we believe can guide the development and functionality of the online tool.

We also explored who our end user might be. Currently, the information that is out there is not getting to landowners effectively. We wanted to understand why, and how we can deliver tools, content, and resources more effectively to landowners.

By the end of 2021 we began to shift our hypothesis that landowners may not be the end user of this tool, but community connectors, such as extension agents, might be compiling relevant information for landowners through this tool. In early 2022, we hired graduate students, Brooke Reynolds, Elize Caiazzo and John Curnyn, to take our effort further and engage in more data gathering, expanding conversations with potential partners, and conducting surveys for potential users and partners. Brooke, Elyse and John completed more than 40 individual interviews during spring and summer 2022. They expanded our database to include information and resources from more than 70 different organizations. They also connected with a number of organizations who are interested in sharing the information we develop. Collectively, we attended 15+ events to specifically network with folks about our effort and build relationships.

Our hypotheses is that landowners are challenged to find and access information about succession. While this is true, it is also only part of the story. There was unanimous opinion among our interviewees that there was a need to aggregate information and resources. And there was additional evidence pointing to the need for a learning platform with a resource library and training modules. Elyse, John and Brooke heard that there is a real need for an investment in the “human” side of the equation and for trainings focused on how to talk to landowners and engage in the difficult conversation about succession planning.

This Report includes their findings, remaining questions, follow-up areas, and recommendations.

Sarah Davies Tilt  
Executive Director  
One Montana

# INTRODUCTION

As the current generation of farm and ranch owners retire, the continuity of their operations and land ownership is dependent on their ability to find a successor. The establishment of a successor to agricultural land and business ownership, and the development of a succession plan to assist this transition is essential to the process of passing a farm on to the next generation as smoothly and successfully as possible. The succession of land ownership and related agricultural business is an issue that continues to grow in prevalence as demographic and generational changes occur. In Montana, the average age for all agricultural producers is 58.9, climbing 1.1 years from 2007-2017 (Sommer, 2017), and in one national survey, two thirds of retiring farmers did not have an identified successor (Land for Good, 2021).

Today, it is often difficult for children of farmers to take over the family farm. Farm equity is often the default retirement plan for farmers because of their financial investment into the land and business; therefore, they can't simply give it to the next generation. Furthermore, financing for the next generation wishing to buy the farm can be difficult in this era of high land values, high estate taxes, and tight credit markets – not to mention the difficulty of beginning to make payments on a loan before ever bringing in a crop. In cases where there are multiple siblings, equitable distribution of inheritable assets can be an issue. Understanding rules related to taxes, land transfers, incorporation, etc. can be extremely important. Additionally, there are numerous interpersonal and values issues that often need to be dealt with in succession arrangements. Family or locally owned agricultural operations have a significant link to their neighboring community, economy, and culture, and the loss of this connection has far-reaching impacts on rural communities throughout the state of Montana.

Given the significant impact succession planning has in local communities and economies, One Montana sought to address this issue through the establishment of their Landowner Education and Resource Network (L.E.A.R.N). The stated goals of the L.E.A.R.N program are “to provide tools, resources and case studies to help prepare and support private landowners to sustain profitable working lands and prepare for succession.” To that end, One Montana identified through research that a significant number of effective tools for succession planning exist both online and in person, however, the ability of landowners to find and access these various tools is often challenging, resulting in less people utilizing the wide range of resources available for them. Thus, a goal of the L.E.A.R.N program is to increase access to the many resources available, in order to increase the overall number of farmers and ranchers that will create a succession plan for their land and business.

The objectives of the research were the following: to identify and consolidate the different resources for succession planning in the United States, to find different resource and tool formats that have been successful elsewhere, and to identify and clarify what barriers that exist for landowners wanting to create a succession plan. Over the course of several months, interviews were conducted with people associated with succession planning from a variety of backgrounds, including: nonprofit

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organizations, government agencies, State university extension agents, mediators and facilitators, land trusts, and farmers and ranchers.

The following report was written with the purpose of discussing the content of the interviews conducted over the course of the Summer of 2022. This discussion includes the common themes and topics brought up by interviewees, as well as their concerns, needs, and attitudes regarding the state of farm and ranch succession in the State of Montana.

## RANCHER INTERVIEW EXAMPLE

**Dale Veseth, Rancher, Phillips County**

*(Interviewed By John Curnyn)*

I was honored to interview Dale Veseth, a rancher from Phillips County with personal experience with succession planning, and a longtime member of the Rancher Stewardship Alliance.

Dale told us one of the most important things to do is develop a process and plan for transitioning. He found it is not so difficult to get a plan down on paper, but ensuring the plan is implemented is a key to success. For example, part of their family's succession plan involves both an educational process and a responsibility process for the ranch, meaning the next generations, or successors, are required to learn the ins and outs of the ranch and take on more and more responsibilities through the process. It can be challenging to plan for specific deliverables within a prescribed timeline because things are never stagnant on a ranch.

Dale is a strong proponent for creating a "one-stop-shop clearinghouse" for succession planning resources. To have a single resource that provided a list of professionals, and a ballpark expected cost, could save precious time in getting new plans started. If a resource that aggregated information was simple and easily available on the internet, it would cut down on a lot of research time. People are going through this process in a piecemeal way over the course of many years. They are grappling with both the weight of making big decisions and finding information which takes time to gather. In Dale's experience, there are good resources out there that he didn't know about and finding them was difficult and time consuming. He believes that by making this information available, when people realize they have a need they will be able to find help more easily and quickly.

Dale felt that expertise was another important factor. Having help within his own community would be ideal, but many folks expect to travel to find someone with succession planning expertise. Something Dale thought might be lacking is recommendations for paid specialized professionals, such as accounting and legal. Dale suggested that a list of people that can support succession planning efforts across Montana, with ratings from other ranchers who have used their services, would be really useful.

Keeping Working Land in Working Hands 5

# METHODS

We collected qualitative data gathered from 35 interviews with a variety of stakeholders such as non-profit organizations, government agents, succession mediators and facilitators, land trusts, and farmers and ranchers. 34 of the interviewees are stakeholders in the United States, and 1 interviewee was from Canada. The list of organizations interviewed can be found in Appendix I. Figure 1 shows a map of all 35 stakeholders interviewed. The vast majority of our interviews were with organizations which include non-profit organizations and private organizations (Figure 2). Qualitative methods are ideal at providing insights into little studied topics (Kreuger and Casey 2009), and these methodical benefits have been noted in past work in agricultural context (Prokopy et al. 2017). Given that we have limited understanding of how U.S. producers deal with land transition, retirement, and estate planning, aka succession planning, we use a qualitative approach to develop a preliminary understanding of this process.



Figure 1. Map of Montana Farmers and Ranchers interviewed

Interviews were conducted on a one-on-one basis between a graduate student researcher and the stakeholder between May 2022 and August 2022. The majority of the interviews were done over the phone, with a small number conducted over Zoom and via email. Each interviewee was asked some or all the standardized questions, based on time restrictions and the direction of the conversation. The standardized questions for stakeholders can be found in Appendix II. The average interview time duration was an hour long, with some lasting as long as 3 hours and others, 30 minutes. All interviews were transcribed with the permission of the participants. Initial interviewed participants were primarily recruited through One Montana affiliates and connections from ranching network conferences, with a reliance on snowball sampling after initial contacts. Snowball sampling is a recruitment technique in which research participants are asked to assist researchers in identifying other potential subjects. It is considered a good method in the context of the study and the target audience (Oregon State University, 2010). The objective of this study was to (1) find tools used in succession planning, (2) what various stakeholders in this field need, (3) if those are met with the current resources, if not, how could One Montana help, and (4) what are the barriers in succession planning?

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Photo: Nicole Wickens Photography

### Stakeholders Interviewed

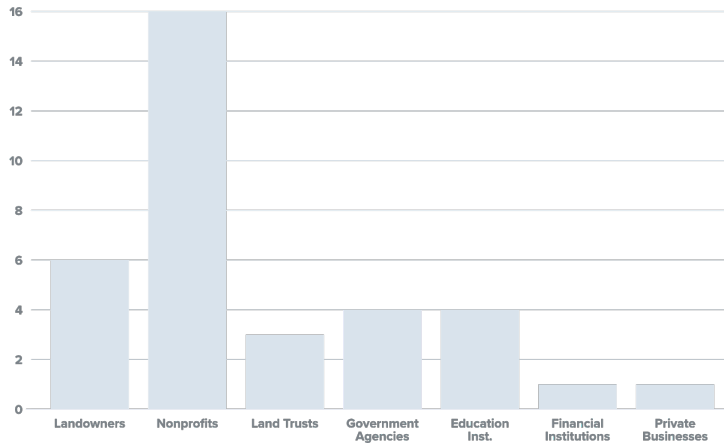


Figure 2. Number of different Stakeholders interviewed

All information transcribed from interviews were uploaded to an online database called Airtable. Airtable is a professional collaborative platform that allows individuals to customize workflow, organize research, and achieve outcomes (airtable.com). Airtable was an efficient tool to consolidate our research. Our Airtable workspace was divided into 7 tables: resources, organizations and efforts, design and layout inspiration, possible audiences, case studies, contacts, and landowners. If an interviewee shared a resource created by their organization, we added it to our list of resources categorized by types of resources or tools such as website, technical assistance, workshops, membership programs, PDF fill out form, case study, PDF report, and videos. Organizations responses to certain standardized questions allowed us to navigate potential partnerships or access available tools.

## OUR FINDINGS

**B**ased on our research and outreach, we recognized a few common threads.

### *1. There is a plethora of succession resources and tools*

At the beginning of our research, we thought One Montana might need to invest in creating a tool for succession. However, new tools do not need to be created because many organizations have already done so. The barrier to accessing these tools is time. The time it takes to search for all the available tools for farmers, ranchers, and succession planning professionals could be utilized in different ways. By consolidating available tools and resources in one place such as a platform could alleviate time for organizations to follow up with members seeking help with certain tools and resources provided from the platform.

## INTERVIEW EXAMPLE

**Caroline Caldwell**, Quivira Coalition and American Farmland Trust  
(Interview by Elyse Caiazza)

We had the opportunity to speak with Caroline Caldwell, a Montanan rancher who helps connect ranchers with young apprentices. She currently works for the Quivira Coalition as the New Agrarian Program Northern Plains Coordinator and in collaboration with American Farmland Trust (AFT). In her position, she partners with ranchers and farmers on large landscape operations in the intermountain west to offer 8-month apprenticeships on working ranches and farms. She has a deep connection to the farming and ranching networks in western and central Montana, especially working with established ranchers looking to educate a next generation of agricultural producers. When I asked her about what succession looks like for a landowner in this day in age, Caroline talked about land being sold and not being passed down to the next generation, which was a reoccurring theme in our research. She brought up the idea of managers on land being given the opportunity to own cattle, lease some land on the property, and getting paid to care for the property. There are many paths to be taken in succession planning, but Caroline feels that family ranches are having the hardest time with succession planning.

Caroline gave examples of how Quivira and AFT are building relationships and working with farmers and ranchers by providing more technical advice and science to back the ranch “plan”. The preferred tools used at the organization are primarily in person advising, workshops, and providing podcasts with accessible, relatable stories for farmers/ranchers to listen to in their own time. She was a strong proponent of having third-party voice for family succession planning primarily because the topic is so emotional.

Ranch communities are supportive of each other, and Montanan’s are willing to drive far to meet and learn from likeminded ranchers. They trust each other and getting support from each other can be a critical part to the succession process. She believes that by providing ranchers with the opportunities to get together and tell their successful succession planning stories goes a long way to moving the process along. Bringing folks together to tell their stories helps everyone know they are “in it together”, builds trust, and provides a safe place to talk and learn.

She also emphasized the importance of knowing whether the ranch will transition to the next generation of family or an outside successor. Planning can look very different to these audiences and while goals may be similar, techniques to meet those goals can be very different. Another challenge is that many landowners are struggling to train and employ managers who might be a future successor.

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**1. People value person to person connections**

Trust is often an important ingredient in the process. That could be trust of a familiar face/fellow community member, or the authority of technical expertise such as lawyers, financial planners, and mediators. When asked what makes a good succession tool, most organizations stress the importance of “getting in person, talking through the resources available and who to call.”

**2. Good communication is necessary – from start to finish**

The single biggest hang-up for succession planning is beginning the process—which often boils down to communication. When asked what aspects of succession planning process to be most difficult for landowners to overcome, a stakeholder talked about “the conflict avoidance. People are not coming to the table because they’re afraid of conflict. They avoid planning because they don’t want to let go of control”. There is a degree of vulnerability that comes with talking about succession and what that really means for a person, which can be difficult to fathom for many landowners. “They keep and do not want to think of their futures”. Conflict is part of the process of communication. While overcoming hurdles, a family/business can identify values and goals for their future and communicate them to each other. This is key to creating a successful business and transition plan.

**SUCCESSION RESOURCES**

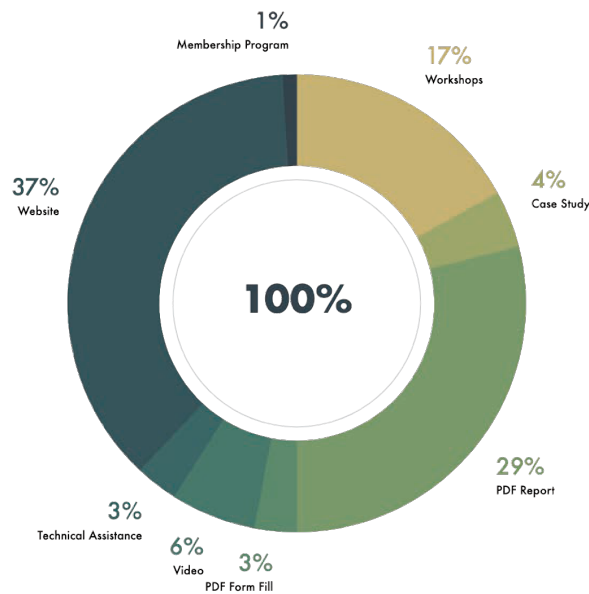


Figure 3. Percentage of Succession Planning Resources compiled in Airtable.

### ***1. Not one single path for succession planning***

There is not one single path for succession planning, therefore, we need a variety of tools such as face to face conversations, workshops, fill in PDF's, paid professionals, facilitation, etc. To have a single platform that offers technical information sources, as well as contact information for paid legal and financial professionals, and mediators would allow a variety of stakeholders to find exactly what they need without sifting through multiple websites. People are all different, thus the way they approach situations will be different. Given that one of the most important and challenging steps taken in this process is to start, the ability to offer a variety of different resources could help the largest amount of people.

These common threads led us to a few important solutions to our research questions.

#### ***1. Need for aggregation of resources***

Cut down time for other organization across Montana to find all the tools and resources for succession planning and therefore, can dedicate more time to having the one-on-one conversation with farmers and ranchers and following up with businesses in the process of planning for succession.

#### ***2. Who is the audience for this platform?***

A platform that can appeal to a wide variety of audiences would be beneficial. In some cases, farmers and ranchers are independent enough to find the right tools and resources for their situation. On the other hand, some farmers need assistance from organizations and technical experts. Therefore, a platform that can provide information and education to both the independent producers and to professionals helping producers. An important and unique characteristic of this platform is the opportunity to provide information and education to a wide variety of professionals, and include both technical skills, such as financial and legal, and "soft-skills" training such as facilitation.

#### ***3. Platform design and functionality***

A successful platform is a learning platform with resource library and training modules focused on soft skills, mediation, and relatable/successful succession stories. A single platform that offers technical information sources, as well as contact information for paid legal and financial professionals, mediators. People are all different, thus the way they approach situations will be different. One of the most important steps taken in this process is to start the process.

# RECOMMENDATION

## ***Host a collaborative workshop for succession planning professionals***

This workshop would be geared towards individuals who work in the succession planning realm as well as individuals who have direct ties to farming and ranching networks that can provide feedback on what is needed to build an aggregated platform. The goals of this workshop are (1) to discuss the next steps necessary for a platform to exist, (2) to explore what is working or not working for different organizations in creating successful succession plans, and (3) how to communicate or present helpful information to a wide variety of audiences, i.e., an app, or a database. Workers in this field put an immense amount of time and effort to conduct research, find tools, create tools and resources, and distribute them to agricultural networks. However, not all organizations have the funding to follow up with each agriculture producer who reached out for help. Therefore, an aggregated platform would alleviate the time necessary to find tools and resources and provide more availability for organizations to help producers through the process of succession planning. Some questions that we hope to answer at this workshop would be:

1. What mutually trusted organization will house this platform?
2. Who would run the platform and update it?
3. How would it be sustained?
4. Would organizations subscribe to this platform, or would it be free?

Additional funding would support the event as well as the planning for the collaborative workshop. The event would require a space to house the invited attendees and a conference room to congregate with food provided, as well as staffing from One Montana, travel assistance, and materials potentially needed such as technology rentals. Money would be allocated for travel purposes. Organizations beyond Montana such as Nebraska Hotline, Land for Good, Holistic Management, and Center for Rural Affairs are leaders in creating tools for ranchers and farmers, providing mediation education for organizations and assistance in the succession process. Therefore, it is important to bring in outside organizations with different perspectives and creative ideas to help facilitate discussions.



## REMAINING QUESTIONS

Upon analyzing our research, we are left with several questions that should be answered as One Montana moves forward with this initiative. The following questions have been identified as important yet remain to be answered:

***What organization should host the L.E.A.R.N succession planning resource tool?***

Given that the purpose of the tool is to increase the number of producers that will create a succession plan, the tool must be hosted by an organization that is broadly trusted across the state of Montana and its communities.

***If the platform is made, how can we increase engagement with it?***

It has been identified through our research that there are several distinct groups that could benefit from this consolidated resource. Would it make sense to design the tool to offer resources for all individual group identified, as opposed to just one stakeholder group?

## CONCLUSION

The information provided over the course of this report serves to reflect some key takeaways, as well as the fluid nature of our research. Over the course of our assessment, the focus of our interviews evolved to reflect the concerns and issues being discussed. Our initial objectives focused primarily on identifying and consolidating the resources available, as well as identifying effective formats currently in use. To those ends, we succeeded in identifying numerous resources as well as effective formats for the L.E.A.R.N succession planning tool. We also sought to learn more of issues brought up by interviewees that reflected the more personal and social barriers that landowners face as they attempt to start a succession plan. Many common barriers to succession planning we found to be related to communication, both with family and planning professionals. As such, a resource designed to maximize the number of landowners that will create a succession plan should reflect the need for guidance with communication. Thus, an ideal final product might offer resources from three distinct categories: guidance for soft skills such as mediation and communication, in-person professional expertise such as financial and legal planning, and online resources such as FAQ pages and informational websites.

It was also revealed throughout our interviews that a convening of the many professionals currently assisting in succession planning across the region could be beneficial for both of them professionally, and One Montana. A convention

may provide an opportunity for experts to clarify best practices and discuss their common issues and successes. As an organizing party, One Montana would benefit from the shared knowledge of these professionals and would be able to synthesize and clarify the learnings that take place, and ultimately more efficiently help communities in Montana with succession planning.

Throughout the course of our work, the research team was delighted and often moved by the discussions had with a variety of individuals. The level of care observed in the professionals assisting with succession planning, as well as the awareness seen in landowners of the gravity of the situation served to further highlight the importance of this project. The interviews with landowners felt special as they allowed the interviewers to step into their world for a moment by sharing their experiences and family matters over the phone, sometimes talking on horseback herding cattle. Moreover, these conversations were educational; they allowed the interviewers to learn about the challenges being faced with succession planning directly from those who are experiencing them. Learning about these issues from the personal experiences of community members and landowners added greater dimensions to the issue and allowed the interviewers to more holistically understand the challenges, and what's at stake when it comes to succession planning.

## AUTHORS



**John Curnyn** is a graduate student at the University of Montana's Environmental Studies Program and Natural Resource Conflict Resolution Certificate Program. He has been assisting research for One Montana's L.E.A.R.N Program since May 2022. During his time living in several different states throughout the country, he has found work as a teacher of environmental science, or helping out on farms. Over the course of his work and travels, he developed an interest in how to balance working lands and functioning ecosystems. In his free time, he enjoys playing music, cooking food, and walking through the beautiful hills of the Missoula Valley.



**Elyse Caiazzo** is a graduate student at the University of Montana's Environmental Studies Program, concentrating in sustainable food and farming. Since May 2022, Elyse has been an intern for One Montana working on their L.E.A.R.N program. Her love of farming started in Maine during her undergraduate degree. She worked at the college farm, where she spent most of her free time tending to the vegetable field, feeding animals, and preparing seedlings for each season. Following the completion of her degree, she worked on small organic farms and farm to table restaurants in Portland, Maine area. In her spare time, Elyse enjoys hiking with her partner and dog, Atlas.

## Appendix I

List of organizations interviewed:

1. American Farmland Trust
2. Center for Rural Affairs
3. Community Food & Agriculture Coalition
4. Dan Scott Ranch Management Program
5. DNRC Rangeland Resources Program
6. Ducks Unlimited
7. Elaine Froese: Farm Family Transition Expert
8. Gallatin Valley Land Trust
9. Holistic Management International
10. Land For Good
11. Land Stewardship Project
12. Montana Land Reliance
13. Montana Stockgrowers
14. MSU Extension
15. MT DNRC
16. MT Farm Bureau
17. Nebraska Department of Agriculture
18. Northern Plains Resource Council
19. Northwest Farm Credit Services
20. Pheasants Forever
21. Plank Stewardship Initiative
22. Prickly Pear Land Trust
23. Quivira Coalition
24. Ranchers Stewardship Alliance
25. Ranching for Profit School
26. Rocky Mountain Elk Foundation
27. Sustainable Ranching Initiative World Wildlife Fund
28. The Nature Conservancy, Matador Ranch
29. University of Iowa
30. USDA NRCS
31. Wheatland County Weed District
32. Winnett ACES

## Appendix II

List of Standardized questions asked to certain stakeholders

### 1. Non-Profit

- a. Do you have succession planning tools?
- b. Do you have members/farmers/ranchers approaching you looking for succession planning help?
- c. What questions are members asking?
- d. Are there certain succession planning subjects that members are especially concerned about?
- e. What have been the most successful tools or resources used by members?
- f. What makes a good succession tool?
- g. Are there tools that members are missing?
- h. Would you be willing to share its tools with One Montana?
- i. Would you want to partner with One Montana to create a succession planning platform?
- j. Could you provide One Montana with ranchers/farmers that would want to speak about succession planning?

### 2. Government Agencies

- a. Does the USDA have constituents ask questions about succession planning
- b. What questions are they asking?
- c. Are there certain succession planning subjects that constituents are especially concerned about?
- d. Does USDA have succession planning tools?
- e. Are there tools that the USDA is missing?
- f. What type of format are these tools? Does this work for people? Is it what they are looking for?
- g. What is the best format for succession planning tools for the USDA constituents?
- h. Would the USDA be willing to share its tools with One Montana?
- i. Would the USDA be willing to partner with One Montana to roll out a succession planning resource?

1. Farmers and Ranchers
  - a. Could you share your experience with land transitioning and succession planning? Was your plan "successful"?
  - b. When did you start your succession plan? How did you find the proper resources to start this process?
  - c. Were any tools or resources helpful?
  - d. Did you have any facilitation or mediation involved? If so, what was that experience like?
  - e. What were some barriers to succession planning or land transitioning on your operation?
  - f. What were your goals with succession planning for your business?
  - g. What format of succession planning worked for you? Extension agent, local organization, or an online platform?
2. Mediators/ Facilitators
  - a. What are common themes in succession planning mediation?
  - b. What are the best strategies to facilitating succession planning conversations with landowners?
  - c. How do you get individuals to the table?
  - d. What do you do about people who don't want to come to the table?
  - e. Pertaining to Succession planning, what does the final product look like?
  - f. What resources have been helpful in your work with succession planning?
  - g. What resources do you think are missing?
3. Land Trusts
  - a. What does (land trust organization) do and what are your goals within your work?
  - b. Are most of your conservation easements donations or bought by MLR?
  - c. Have bargain sales been incorporated into succession planning?
  - d. Does [organization] have members/farmers/ranchers approaching [organization] looking for succession planning help?
  - e. Have you noticed conservation easements being a tool for succession planning?
  - f. How does your organization get received based on location in Montana east vs. west?
  - g. How do you navigate conversations? Are you noticing the need for more soft skill training?

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## *V. Conclusion*

This portfolio emphasizes the importance of keeping working hands on working lands by recognizing the barriers a growing generation of farmers and ranchers face as landowners age out of their livelihood. Each component of this portfolio helps me further understand a farmer's or rancher's personal and professional relationship with the working landscape. This relationship can be complicated as I discussed in the literature review, the One Montana Landowner Education and Resource Network report, and in my Community Food and Agriculture Coalition (CFAC) reflection. Ideally, farm succession planning starts long before a landowner is reaching retirement age; that is, the succession process should start when they develop their business plan. As a landowner grows, evolves, and invests in the landscape, they should be considering the land's future. In a new survey released by the National Young Farmers Association, access to land and the ability to purchase it were rated as the top barriers to entering farming. According to the survey, 59% of young farmers named finding affordable land to buy as very challenging, and 45 % of young farmers named finding available land to buy as extremely challenging (Ackoff et al. 2022). These barriers outweigh the opportunities available to young farmers. However, financing retirement can be equally difficult for aging farmers. Farmland capital such as the land and the equipment might be the only financial option for funding retirement. Therefore, the farmer and spouse need to sell their assets at a price suitable for a post-farming lifestyle. So, where does this leave our food system and farmland? How do we prevent farmland loss by connecting these two generations? How do we transition land while leaving both generations financially secure and housed?

This portfolio explored how existing farmers plan for their future and who will take over the land after retirement. In my literature review, I investigate the necessary steps to continue family farms for generations in America. The process and plan, complex in nature, involves a substantial amount of communication with family members and one's advisory team, and flexibility as the farmland owner slowly transitions from farmer to retiree. Each family is unique, and the process is not a simple five-step path. However, family farm succession planning at younger ages can expose the potential path the landscape and business can take before "all hope is lost" and the land is sold to pay for the farmer's retirement. Young aspiring farmers, whether related or not, can be part of the overall conversation – the landscape's future. The one catch is how to connect aging farmers with a lack of a successor to unrelated young farmers. My internship with the Community Food and Agriculture Coalition helped me further understand the need for education and resource outreach to navigate this problem. Even though website design may not feel impactful, the website is visited by new farmers seeking help with approaching a landowner, and older landowners wondering how to approach leasing land, and relinquishing control of property they hold dear to their hearts. Relinquishing control could be a slow process involving years of mentoring with a future successor or could be more abrupt based on the landowners financial and or personal needs at the time. Through this internship and my research with One Montana, I learned how deeply connected Montanans are with their landscape. Montana communities are associated with their unique landscapes – the eastern grassy plains and badlands and the western valleys and forests. When considering how to apply resources, tools, and succession planning processes, the approach is not universal and applicable to all situations/families.

Deconstructing the standardized concept of land transition processes challenged me to approach each organization and each region of Montana as different from one another. By taking a step back from what I have read, I learned from listening to individuals' experiences. I think communication, conversations, and personability are a few strong suits of mine. However, I am not from this landscape and conducting interviews with individuals from Montana was an adjustment. I quickly learned that Eastern and Western Montana have different agricultural priorities and practices that influence the local community's viability. I learned to not approach interviews as a list of questions to be answered, but rather as a purposeful conversation that allows the interviewee to guide the discussion. It fell on me to navigate the conversation in a direction that helped me grow and understand the topic better and make the individual feel respected, recognized, and engaged. Digesting these conversations felt easy as I left most calls excited to add more pieces to a complex puzzle.

It is tricky to identify points where I would have done the work differently, since all my projects revolve around land access barriers and processes. I knew I wanted to do work with CFAC and Farm Link Montana when I experienced my own land access barriers back in Maine. I came to the EVST program with a burning desire to help young farmers access land and not feel alone along the bumpy road to acquiring land. These projects expanded my knowledge and pushed me to diversify my education by learning from published research and from the people who are experiencing land access challenges, finding solutions to their situations, and sharing their stories as guidance for others to follow. I hope to apply my past two years of education, community engagement, and research by being a part of the many conversations happening around land access solutions including succession planning on family farm operations. I never knew about succession planning until working with One Montana, and though succession

planning is not the sole solution to connecting young farmers to aging landowners, it is an understudied, necessary component in the grand scheme of land access. After all my work, I feel a pull towards facilitation and mediation, helping families and farmers navigate the next stage of their land, whether it be inherited by an heir or transitioned to a young non-heir farmer. I envision my role in the succession planning process as a resource. As a resource, I could help connect the farmers to tools that fit their individual needs. Each family farm is unique, so the process cannot always be approached uniformly. With each step, conversations between family members and successors (family or not) need to happen, and as a resource, I could facilitate the group in constructive conversations that will help with overall trajectory of the succession plan.

With a goal to keep working hands on working land, I hope to help connect aging farmers in need of a successor with farmers seeking land. CFAC's website, Farm Link Montana, sparks for these connections, but more "match making" may be necessary to make successful connections. I believe more research needs to be conducted on small farms and their needs and benefits to rural spaces. Missoula, Montana in particular houses many small farms supporting the regional food system through market supply collaboration and community involvement. Beyond the scope of this website, immersing myself and my family in the local community and understanding the obstacles and strengths of rural communities in Montana face will help me form stronger relationships with community members. Montana is special in the way that the state is big, but the communities are interconnected, regardless of the distance between them. Being a part of the Montana community could help me make better connections amongst the many farming networks across the state. Linking Montana farming networks could be a way to successfully find aging farmers seeking a younger generation's help in continuing their livelihood.

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