



**Project Name:** Farming...the Next Generation - Phase Two - Building & Strengthening Farm Succession & Linking

**Project Number:** RME-DTJ02459

**Submitted:** 7/25/2008 2:32:40 PM Central Time

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**Project Summary:**

Farm business succession is critical to the future of farming. Estimates indicate 500,000 farmers will retire in the next decade. These farm families face financial, legal and human resource risks as they transfer the business. Families fear the transition will ruin family relationships and the business. Communication, goal setting, and implementing a written succession plan can mitigate these risks. This project encourages families to develop their succession plans and offers education and assistance to the families. The project provides producer workshops in Texas. Texas Extension staff will attend professional development offered by the International Farm Transition Network. Team members and collaborators will provide succession planning programs to families. Texas Extension staff will receive assistance with developing a coordinated network of resources for families facing succession issues. They will also receive help developing a coordinated network of agencies and resources within their state.

**Producer Impact:**

Research indicates a majority of producers will be highly dependent on the farm operation to fund their retirement. They may need the sale of the farm assets to fund their retirement or it may be more advantageous for them to leave assets in the operation and continue to receive income from the use of those assets. When you juxtapose these two options against the desire to keep the farm in the family, it can place great emphasis on the next generation's ability to take over the business. The farm's ability to carry multiple farming partners and the partners' ability to communicate effectively are imperative to a successful farm succession.

The proposed targets will help farm families address these two important aspects of farm transfer. Analyzing the farm's financial capacity is essential. This can, many times, open up lines of communication between the two generations and can also help them focus on a task together. This may be the first time the younger generation has been allowed to see the farm's financial performance. It can allow the partners to discuss alternatives to generate more income or reduce expenses to accommodate additional partners in the business.

Several targets address communication and steps to strategic planning. These workshop activities allow the partners to communicate effectively as partners, and step away from their roles as parent/child. The transition from a parent/child relationship to a more balanced farming partner relationship is an important step to mitigate the risk of conflict that can derail succession plans.

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## Targets - What Participants Will Learn, Achieve, Apply

	<u>Target(s) that will happen by end of project</u>	<u>When Measured</u>	<u>Est. Number</u>	<u>How Will You Verify</u>
1	Farm family members will develop a farm family meeting agenda with agenda items pertinent to their unique farm succession issues.	March 1, 2009	100	participants will develop agenda and to do list as exercise during workshop
2	Farm family members will analyze the financial capacity of the farm to carry multiple partners.	March 1, 2009	100	in session workshop activity
3	Farm family members will identify and prioritize the issues their farm business needs to address to move forward in succession planning.	March 1, 2009	100	workshop exercise
4	Farm family members will assess their personal and business goals and discuss them with their farming partners and other family members.	May 1, 2009	100	written 4 month follow up evaluation
5	Farm family members will begin the discussion of the transfer of management and assets of the farm business.	May 1, 2009	100	written 4 month follow up evaluation
6	Farm family members will establish goals surrounding the farm succession issue for their families and farming businesses.	May 1, 2009	100	written 4 month follow up evaluation
7	Farm families will develop the basic components of a succession plan and action steps for continuing the process.	May 1, 2009	100	written 4 month follow up evaluation

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	<u>Target(s) that will happen after project</u>	<u>When Measured</u>	<u>Est. Number</u>	<u>How Will You Verify</u>
1	Farm families will successfully transfer some management and some assets to the next generation.	December 31, 2009	75	one year follow up evaluation
2	Farm family members will improve communication skills and implement these skills during farm succession discussions and farm business meetings.	December 31, 2009	75	one year follow up evaluation

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## **Describe Participant(s):**

Data from the 2002 Ag Census indicates approximately 55% of the farmers identifying farming as their primary occupation are 55 years old or older. USDA estimates that over 500,000 of the nation's two million farmers will retire during the next decade and they will be replaced by 350,000 entrants. This means a potential for literally thousands of farm transfers in the United States over the next ten years.

Recent research conducted in Iowa, Pennsylvania, New Jersey, North Carolina, and California indicates only a minority of farmers have developed farm business succession plans. The research indicates a majority of farmers have not discussed their retirement or succession plans with anyone. It also indicates producers will be very dependent on the farm assets to fund their retirement. There are many reasons farmers put off developing retirement or succession plans. They may not feel the farm is financially positioned to support their retirement and another family, or they may view their successor as their child, rather than as a viable manager and farming partner.

Farm families can make the succession process more efficient and less costly if they communicate their goals and develop some long range plans before they involve paid professionals, such as their accountants and attorneys. Producers will seek out these workshops as an opportunity to plan and analyze their farm's financial capacity before working with their attorney.

Farm families understand the need for planning for the transfer. But day to day management issues "get in the way" of a concerted effort to discuss the future. The female partners in the operation can be the catalyst for finalizing some type of transfer plan. They realize they may be left with all the decisions if their male partners die before they do. Farm women can also demand harmony among the farming partners as well as off-farm heirs. Reaching this audience is crucial.

Participants in these programs will likely have a successor identified and have at least discussed the possibilities of the successor returning to the farm. In workshops in Iowa, Nebraska and Wisconsin the participants were highly motivated and engaged in working on their succession plans and completed homework assigned between the workshops. Participants have noted the progress they've achieved by attending the workshops and felt their participation contributed to their successful farm successions.

We estimate 25 farm families will participate in this program, averaging four people per farm, totaling 100 participants.

## Project Steps

	<u>What Project Team Does</u>	<u>What Participants Do</u>	<u>When Measured</u>	<u>Est. Number</u>	<u>How Will You Verify</u>
1	Review Iowa, Nebraska and Wisconsin and other state materials for train the trainer workshop to to adapt materials for Texas program.	Not applicable (NA)	August 1, 2008		completed materials for Texas
2	Conduct train the trainer workshop at the International Farm Transition Network annual meeting and conference.	Texas collaborators attend training	August 30, 208	2	evaluation & initial development of workshops
3	Organize dates for the two weekend workshops	NA	August 30, 208		workshop dates and location confirmed
4	Promote workshops (news releases, direct mailings, personal contacts)	Request information and registration materials	November 1, 2008 or 2 weeks before 1st session	400	log of contacts and requests for information
5	Conduct 1st session (two day workshop)	Attend first session and participate in workshop exercises and activities.	January 31, 2009	100	attendance list
6	Conduct end of session evaluations	Complete evaluations on 2nd day of the first session	February 1, 2009	100	completed evaluations
7	Summarize evaluations	NA	March 1, 2009		completed summary
8	Prepare 2nd sessions workshop agenda to reflect needs of participants.	NA	March 1, 2009		revised agenda for 2nd weekend session
9	Conduct 2nd session (two day workshop)	1st session participants return for 2nd session.	March 31, 2009	100	attendance list
10	Texas Extension staff make individual contacts with families in workshops.	Review financial situation, discuss issue of their farm succession with professionals.	June 15, 2009	75	summary of farm consultation discussion

## Project Steps

	<u>What Project Team Does</u>	<u>What Participants Do</u>	<u>When Measured</u>	<u>Est. Number</u>	<u>How Will You Verify</u>
11	Texas Extension staff will identify state agencies, non-profits and/or universities that have recognized the importance of a coordinated network to support farm transfers and beginning farmers.	NA	December 31, 2009		pre-post evaluation of participating states as to their perception of potential collaboration in their state in regards to the farm succession issue

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**Risk Categories:** Financial, Legal, Human

### **Investor Target Area(s):**

Improved understanding and use of:

Financial records, analysis, and bench-marking

Capital and financial assets

Plans and tools to address succession, estate planning, health, and well being

Improved:

Business and strategic planning

Interpersonal, family and business relationships

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## **Project Description**

This project will provide farm succession education to producers in Texas. The program model is designed to provide families with the tools and a planning process to guide them through the farm succession process. The program is spread over two weekends, with at least one month between sessions. This allows participants time to digest the information, apply it to their situation and come back with completed homework assignments and their questions. Work sessions are integrated throughout the four days during which the families are encouraged to work on their vision, mission, goals, issues, and action plans and discuss them with their farming partners. Families will be encouraged to bring their financial records to analyze the farm's ability to carry more partners. Other topics will include communication, conflict management, and business, retirement and estate planning.

The project will begin with two days of training for Texas team members, provided by members of the International Farm Transition Network. This training will give the team members farm succession educational materials and a program model that has proven successful for other states in the country. Texas Extension staff will be encouraged to adapt the materials to fit their clients' needs.

Team members will organize, promote and implement the four day program. Team members will assist with program content and presentations. Follow up consultations with families will be offered to those who are interested in continuing their planning or if they need further financial analysis. Evaluations will be done at the end of each weekend and four months after the second weekend to measure the progress of the succession plans and the impact of the program. Team members will assist with the development of the evaluation instruments.

A secondary component of this project is the consideration of the development of a linking service. Within the time frame of this granting cycle a full linking service cannot be expected. However, Texas team members are asked to begin the task of bringing together the players to discuss the issues of farm business succession. The ultimate goal would be the eventual development of a linking service; however, a positive result would be improved communication among state agencies, organizations and educational institutions in regards to farm succession planning.

### **Tools, curriculum, presenters:**

Iowa, Nebraska and Wisconsin Returning to the Farm curricula

Materials adapted by previous participating states

John Baker, Iowa State University and IFTN member

Joy Kirkpatrick, University of Wisconsin Center for Dairy Profitability

International Farm Transition Network materials and members

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## **Project Team**

### **Team leader and members:**

John Baker, President, International Farm Transition Network.

jrbaker@iastate.edu

Project Director. Mr. Baker will provide training to collaborators, assist with teaching programs in participating states and provide resources and support for states as they form their own partner networks and linking programs.

Dr. Danny Klinefelter, Professor and Extension Economist, Texas A&M University

Dr. Klinefelter will coordinate the farm succession program in Texas. He will also coordinate training for instructors of the farm succession programs in the southern region. He will teach components of the curriculum at the Texas workshops.

Joy Kirkpatrick, Outreach Specialist, University of Wisconsin Center for Dairy Profitability

joy.kirkpatrick@ces.uwex.edu

Ms. Kirkpatrick will provide training and resources to collaborators. Kirkpatrick will also provide assistance with reaching the identified target audience of farm women in the participating states. Kirkpatrick will assist with the development of end of session and follow up evaluation instruments.

### **Project collaborators:**

#### **Describe your team's capacity to deliver this project:**

Mr. Baker and Ms. Kirkpatrick have delivered these types of programs in their own states and have successfully counseled farm families through the succession process. They have developed train the trainer workshops and can assist Texas with the delivery and evaluation of their program. They are committed to providing support to Texas personnel with each project step. Each of the team members are experienced Extension specialists in their states and focus on farm succession.

Mr. Baker and Ms. Kirkpatrick also have connections with other states who have succession and linking programs and can use these contacts as resources for the delivery of this project.

## **Project Review**

After reviewing the projects in the Southern Region, we have identified two projects that we can collaborate with or build on their work.

"A Comprehensive Approach to Farm Business Succession Planning". Andrew Branan, North Carolina. 2004 Competitive Grant Program. This project published materials titled "Planning the Future of Your Farm: A Decision-Support Guide for Farm Transfer", that could be used in our project materials. Branan's project also developed a case-study that we can use in the participating southern states' programs.

"Planning for the Future of the Farm: Managing Risks of Farm Business Transition". Jesse Richardson & Alex White, Virginia. 2006 Competitive Grant Program. Modules developed in this project can be incorporated into our project, where applicable.

Both Branan and Richardson are members of the International Farm Transition Network and can serve as resources to the states and organizations involved in this project.

**Original pre-proposal request:** \$50,000

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**Budget**

Section A. Senior/Key Person	\$0
Section B. Other Personnel	\$0
Total Salary, Wages and Fringe Benefits (A + B):	\$0
Section C. Equipment:	\$0
Section D. Travel:	\$4,500
Section E. Participant/Trainee Support Costs	\$0
Section F. Other Direct Costs:	\$6,346
Section G. Direct Costs (C thru F):	\$10,846
Section H. Indirect Costs	\$1,665
Section I. Direct and Indirect Costs (G + H):	\$12,511

Do you have institutional approval? Yes

Are you applying for funding for this project elsewhere or have you received funding for this project previously? No

Explain (if yes)

## Budget Narrative

Budget Narrative

Budget Narrative Southern Risk Management Grant

Budget Narrative

A. Salary and wages - None requested

B. Other personnel - None requested Salary and wages total = \$0

C. Non-expendable equipment - None requested

D. Travel:

Trainee to NFTN training = \$1500 (Airfare = \$1000/person; 2 nights @ 175/night; per diem & parking = \$75/day)

Outside speaker travel = \$3000 Total Travel = \$4500

E. Participant/Trainee costs - None

F. Other Direct Costs

Materials and supplies:

Building Effective Farm Management Systems 25 @ \$90 = \$2250

Notebooks 25 families 2 notebooks @ \$7.00 = \$350

Notebooks 3 trainees 1 notebook @ \$7.00 = \$21

Transition plan notebooks 25 families 1 notebook @ \$5.00 = \$125

Copies 300 pages for 50 notebooks @ \$0.10 = \$1,500

Tabs/Dividers 10 Tabs for 50 notebooks @ \$0.15 = \$75

Tabs/Dividers 5 Tabs for 25 notebooks @ \$0.15 = \$19

CD's 3 trainees 1 per trainee @ \$2.00 = \$6.00

Postage and advertising @ \$1,000 = \$1,000

Mailing list rental @ \$1,000 = \$1,000

Materials and supplies Total: \$6346

J. All other direct costs:

Meeting rooms 3 room rentals @ \$600 = \$1800 (\$200/room rental x 3 rooms x 3 days)

Consultants Outside speaker honorariums 3 @ \$1,000 = \$3,000

Kirkpatrick will develop curriculum and conduct the evaluations for project 5 days x \$200/day = \$1,000

All other direct costs - Total: \$5,800

Total direct costs \$16,646

F & A Indirect costs (10%) \$1,665

TOTAL \$18,311

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**APPLICATION FOR FEDERAL ASSISTANCE  
SF 424 (R&R)**

<b>2. DATE SUBMITTED</b>	<b>Applicant Identifier</b>
<b>3. DATE RECEIVED BY STATE</b>	<b>State Application Identifier</b>
<b>4. Federal</b>	

**1. \* TYPE OF SUBMISSION**

Pre-application  Application  
 Changed/Corrected Application

**5. APPLICANT INFORMATION**

\* Legal Name: Texas AgriLife Extension Service  
 \* Organizational DUNS: 781568837

Department: \_\_\_\_\_ Division: \_\_\_\_\_  
 \* Street1: 2147 TAMU Street2: \_\_\_\_\_  
 \* City: College Station County: Brazos \* State: TX \* ZIP Code: 77843-2144  
 \* Country: USA

Person to be contacted on matters involving this application

Prefix: \* First Name: Middle Name: \* Last Name: Suffix:  
 Ms. Diane M. Gilliland  
 \* Phone Number: 979-845-4761 Fax Number: 979-862-7775 Email: d-gilliland@tamu.edu

**6. \* EMPLOYER IDENTIFICATION (EIN) or (TIN):**  
746000541

**7. \* TYPE OF APPLICANT:**  
H. Public Institution of Higher Education

**8. \* TYPE OF APPLICATION:**  New  
 Resubmission  Renewal  Continuation  Revision

Other (Specify):  
**Small Business Organization Type**  
 Women Owned  Socially and Economically Disadvantaged

If Revision, mark appropriate box(es).  
 A. Increase Award  B. Decrease Award  C. Increase Duration  
 D. Decrease Duration  E. Other (specify) \_\_\_\_\_

**9. \* NAME OF FEDERAL AGENCY:**  
USDA CSREES

\* Is this application being submitted to other agencies? Yes  No   
 What other Agencies? \_\_\_\_\_

**10. CATALOG OF FEDERAL DOMESTIC ASSISTANCE NUMBER:**  
10.500  
TITLE: USDA CSREES

**11. \* DESCRIPTIVE TITLE OF APPLICANT'S PROJECT:**  
Farming...the Next Generation - Phase Two - Building and Strengthening Farm Succession & Linking

**12. \* AREAS AFFECTED BY PROJECT (cities, counties, states, etc.)**  
TX

**13. PROPOSED PROJECT:**  
 \* Start Date: July 1, 2008 \* Ending Date: June 30, 2009

**14. CONGRESSIONAL DISTRICTS OF:**  
 a. \* Applicant: TX17 b. \* Project: TX17

**15. PROJECT DIRECTOR/PRINCIPAL INVESTIGATOR CONTACT INFORMATION**

Prefix: \* First Name: Middle Name: \* Last Name: Suffix:  
 Dr. Danny Klinefelter

Position/Title: Professor & Ext. Economist \* Organization Name: \_\_\_\_\_  
 Department: Agricultural Economics Division: \_\_\_\_\_  
 \* Street1: 2124 TAMU Street2: \_\_\_\_\_  
 \* City: College Station County: Brazos \* State: TX \* ZIP Code: 77843  
 \* Country: USA  
 \* Phone Number: 979-845-7171 Fax Number: 979-845-7444 \* Email: danklinefelter@tamu.edu





**RESEARCH & RELATED BUDGET - SECTION C, D, & E, BUDGET PERIOD 1**

\* ORGANIZATIONAL DUNS:

\* Budget Type:  Project  Subaward/Consortium

Enter name of Organization:

\* Start Date:  \* End Date:  Budget Period: 1

*(If the Reset Entries button is pressed, please navigate to previous year to enable the submission of the*

**C. Equipment Description**

List items and dollar amount for each item exceeding \$5,000

	Equipment item	* Funds Requested (\$)
1.	<input type="text"/>	<input type="text"/>
2.	<input type="text"/>	<input type="text"/>
3.	<input type="text"/>	<input type="text"/>
4.	<input type="text"/>	<input type="text"/>
5.	<input type="text"/>	<input type="text"/>
6.	<input type="text"/>	<input type="text"/>
7.	<input type="text"/>	<input type="text"/>
8.	<input type="text"/>	<input type="text"/>
9.	<input type="text"/>	<input type="text"/>
10.	<input type="text"/>	<input type="text"/>
11.	<b>Total funds requested for all equipment listed in the attached file</b>	<input type="text"/>
	<b>Total Equipment</b>	0

Additional Equipment:

**D. Travel**

		Funds Requested (\$)
1.	Domestic Travel Costs ( Incl. Canada, Mexico and U.S. Possessions)	4500
2.	Foreign Travel Costs	<input type="text"/>
	<b>Total Travel Cost</b>	4500

**E. Participant/Trainee Support Costs**

		Funds Requested (\$)
1.	Tuition/Fees/Health Insurance	<input type="text"/>
2.	Stipends	<input type="text"/>
3.	Travel	<input type="text"/>
4.	Subsistence	<input type="text"/>
5.	Other <input type="text"/>	<input type="text"/>
<input type="text"/>	<b>Number of Participants/Trainees</b>	<input type="text"/>
	<b>Total Participant/Trainee Support Costs</b>	0

**RESEARCH & RELATED BUDGET - SECTION F-K, BUDGET PERIOD 1**

Next Period

\* ORGANIZATIONAL DUNS:

\* Budget Type:  Project  Subaward/Consortium

Enter name of Organization:

\* Start Date:  \* End Date:  Budget Period: 1

*(If the Reset Entries button is pressed, please navigate to previous year to enable the submission of the*

F. Other Direct Costs	Funds Requested (\$)
1. Materials and Supplies	<input type="text" value="6346"/>
2. Publication Costs	<input type="text"/>
3. Consultant Services	<input type="text" value="4000"/>
4. ADP/Computer Services	<input type="text"/>
5. Subawards/Consortium/Contractual Costs	<input type="text"/>
6. Equipment or Facility Rental/User Fees	<input type="text" value="1800"/>
7. Alterations and Renovations	<input type="text"/>
8. <input type="text"/>	<input type="text"/>
9. <input type="text"/>	<input type="text"/>
10. <input type="text"/>	<input type="text"/>
<b>Total Other Direct Costs</b>	<input type="text" value="12146"/>

<b>G. Direct Costs</b>	<b>Funds Requested (\$)</b>
<b>Total Direct Costs (A thru F)</b>	<input type="text" value="16646"/>

H. Indirect Costs	Indirect Cost Rate (%)	Indirect Cost Base (\$)	* Funds Requested (\$)
Indirect Cost Type			
1. Modified total direct costs	<input type="text" value="10"/>	<input type="text" value="16646"/>	<input type="text" value="1665"/>
2. <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
3. <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
4. <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<b>Total Indirect Costs</b>			<input type="text" value="1665"/>

Cognizant Federal Agency   
 (Agency Name, POC Name, and POC Phone Number)

<b>I. Total Direct and Indirect Costs</b>	<b>Funds Requested (\$)</b>
<b>Total Direct and Indirect Institutional Costs (G + H)</b>	<input type="text" value="18311"/>

<b>J. Fee</b>	<b>Funds Requested (\$)</b>
	<input type="text"/>

**K. \* Budget Justification**      
 (Only attach one file.)

OFFICE OF Danny Klinefelter

Dept. of Ag. Economics  
2124 TAMU  
College Station, TX 77843-2123  
Tel.979/845-7171  
Fax.979/845-7444  
danklinefelter@tamu.edu

February 25, 2008

Dr. Ken Stokes, Director  
Southern Region Risk Management Education Center  
Texas AgriLife Extension  
1229 North U.S. Highway 281  
Stephenville, TX 76401

Dear Dr. Stokes:

Texas AgriLife Extension is pleased to have the opportunity to support the proposed "Farming ... the Next Generation - Phase Two - Building and Strengthening Farm Succession and Linking" project.

Identifying and preparing capable successors for the next generation of farms and ranches is essential to the continuing viability not only of production agriculture, but also to the rural communities that depend on agriculture in order to remain economically viable.

We believe that projects such as this can help mitigate the many risks that are involved in planning and implementing a successful transition of the farm business to the next generation.

Sincerely,

A handwritten signature in black ink that reads "Danny Klinefelter".

Danny Klinefelter  
Professor and Extension Specialist



OFFICE OF Danny Klinefelter

Dept. of Ag. Economics  
2124 TAMU  
College Station, TX 77843-2123  
Tel.979/845-7171  
Fax.979/845-7444  
danklinefelter@tamu.edu

February 25, 2008

Dr. Ken Stokes, Director  
Southern Region Risk Management Education Center  
Texas AgriLife Extension  
1229 North U.S. Highway 281  
Stephenville, TX 76401

Dear Dr. Stokes:

I am writing in reference to the project proposal "Farm...the Next Generation - Phase Two - Building and Strengthening Farm Succession and Linking." I am committed to serving as a Co-Principal Investigator on the Grant.

We have formed a network of eleven four-year colleges with agriculture programs in Texas to assist in promoting the program, and to help in identifying and recruiting participants. I also work closely with the Cooperative Farm Credit System which has committed to supporting our efforts. I also will serve as coordinator of the Planning the Return to the Farn/Ranch Program through Texas AgriLife Extension.

Sincerely,

A handwritten signature in black ink that reads "Danny Klinefelter".

Danny Klinefelter  
Professor and Extension Specialist





**266 Animal Sciences Building  
1675 Observatory Drive  
Madison, WI 53706-1284**

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Phone (608) 263-5665 Fax (608) 263-9412 <http://cdp.wisc.edu>

UNIVERSITY OF WISCONSIN-EXTENSION, MADISON, PLATTEVILLE AND RIVER FALLS

February 26, 2008

Dr. Ken Stokes, Director  
Southern Region Risk Management Education Center  
Texas AgriLife Extension  
1229 North U.S. Highway 281  
Stephenville, TX 76401

Dear Dr. Stokes:

I am writing to inform you of my role as a team member of the project "Farming..the Next Generation – Phase Two- Building and Strengthening Farm Succession & Linking". I am excited to be a part of the project proposal and feel it is important to reach farm families with the education and the planning process that this program provides them.

I will be helping with the project by developing materials and assisting with the training that will be provided to Texas and other participating states. I will also work with state team members to develop each of the end of session evaluations as well as the four month follow up evaluation. If needed, I will be available to help teach workshops.

Farm succession is an important risk management topic and the need for this type of education continues to grow in the United States. As farm families face the issue of transferring the assets and management to the next generation the two most important factors that influence their success are the farm's ability to fund another income and the ability of the partners to communicate effectively.

I look forward to working on this project and hope you see the potential of the proposal. If you have questions about my role with this project please contact me at 608.263.3485 or [joy.kirkpatrick@ces.uwex.edu](mailto:joy.kirkpatrick@ces.uwex.edu)

Sincerely,

Joy Kirkpatrick  
Outreach Specialist  
UW Center for Dairy Profitability