

Red Tomato Farm Succession Planning Workshop–Agenda

Date: Tuesday, February 27, 2024

Location: Locust Grove, Poughkeepsie, NY

Facilitation: Will O'Meara, Land For Good

Made possible with funding from NESARE

Materials:

- Selected worksheets from [Farm Succession Planning: Where Do I Start? Workbook](#)* see below
- Modified and Printed [Management Structure Diagram](#)

9:00 Check-in, coffee, networking

9:15 “Who’s in the room?” and Icebreaker (Michael Rozyne)

9:45 Farm Succession Overview

- Objective 1: Understand the motivations, needs, and common pitfalls of farm succession planning, using real farms to ground these concepts.
- Objective 2: Understand the different elements of farm succession planning.
- Bring to light a variety of situations and the types of problems succession planning can solve
 - What other issues can succession planning solve?

10:45 Assess Your Situation

- Objective 1: With an understanding of the aspects of succession planning, take stock of your operation as it currently stands.
- Objective 2: Identify major gaps that need to be filled or addressed.
- Objective 3: Get familiar with the “Team Approach” to succession planning, and consider who might be on your team.

11:15 Break

11:40 Visions and Goals

- Objective 1: Take time to reflect on your values and what you hope to achieve by transferring the farm to the next generation
- Objective 2: Practice talking about your vision and goals with another farmer, or with a spouse/business partner/family member.

12:30 Lunch and Networking

1:30 Farmer Panel Discussion

- Objective 1: Utilize farmer experience and expertise from within the Red Tomato/EcoFruit Network
- Objective 2: Q&A w/ audience to deepen understanding and connection within the Red Tomato/EcoFruit Network.

3:00 Break

3:10 Management Transfer Introduction

- Objective 1: Introduce tools to help farms take stock of their management and labor assets, identify gaps, and create a plan for successful transfer.
- Objective 2: Participants leave with a tangible item that has been completed or partially completed towards their succession goals, galvanizing them to take next steps.

4:15 Small Group Reflection (Pairs or Triplets)

- Objective 1: In small groups identify next steps they will take towards succession goals.

4:30 Evaluations and Closing

5 Cider Tasting

***Link to LFG entire Workbook:**

[LFG-Farm-Succession-Planning-Where-Do-I-Start-Workbook.pdf \(landforgood.org\)](#)