

Starting a process: Practice and policy lessons from a farm succession planning intervention in the Australian dairy industry

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Abstract

Intergenerational succession on family farms typically unfolds through several stages over an extended period: it is a *process*, not an *event*. Amidst the continued concern in many countries that farm succession is not proceeding well, there are two salient questions that arise in relation to succession planning *as process*: (1) how can farm owners be assisted to *start* the process and (2) what policy settings are needed to support succession planning *as a process*. This paper addresses these questions through discussion of a study of a succession planning intervention in the Australian dairy industry. The study involved in-depth interviews with participating farm families (N=10), and facilitated reflection with the two consultants who delivered the intervention. Nine of the ten families reported that the intervention had generated concrete steps in their intergenerational transition process. A key feature was that the delivery method was flexible enough to identify and work on one or more specific points of current “stuckness” within each individual family’s situation. The nature of the “stuckness” differed greatly between farms and the consultants observed that they fully expect a number of the farms to become stuck again when a future point of difficulty is encountered. In the context of Australia’s pluralist agricultural advisory system, these findings suggest that an important role for succession planning interventions is to build connections between farm families and the range of different advisory professionals whose assistance will be needed to deal with different points of “stuckness” as they arise.

1. Introduction

Australian farms and Australian agricultural policy both differ in important ways from their European counterparts. And yet the farm succession process – how people enter farming careers, how they leave them, and how farm businesses proceed through these various transitions – is currently a matter of concern for agricultural industries and policy-makers in both Australia and the EU (Victorian Government 2011; Lobley *et al.* 2012; Conway *et al.* 2016). Particular concerns include the on-going ageing of the farm population, the difficulties that young people face in entering farming and a concern that problems with the succession process are constraining innovation and industry renewal.

This concern that farm succession processes are not occurring as effectively as they should be leads to an interest in how agricultural policy, and how agricultural advisory practice, can assist. Succession planning has existed as an area of agricultural advisory practice for some decades, and there is a body of scholarly research that has documented successes and failures, and proposed theory and practice principles (Barclay *et al.* 2007; Goeller 2012; Leach 2012). Nevertheless, this is still noted as area where little is known and therefore where further empirical research is warranted (Baker 2012; Lobley and Baker 2012; Sappey *et al.* 2012). There are two consistent findings from previous research that provide a useful entry points for further investigation. Firstly there is the oft-repeated observation that intergenerational transition is indeed “a process, not an event” (Leach

2012: 200). Secondly there is the finding that there is often a specific resistance within family farms, as in family firms more generally, to *beginning* this process (Lansberg 1988).

This paper uses the results of a study of a succession planning intervention delivered in 2015 to a small cohort of Australian dairy farming families to address two specific questions: (1) what type of advisory intervention is helpful in assisting families to get started with succession planning and (2) what are the implications for agricultural policy if one takes seriously the finding that succession planning is indeed a process that takes place over an extended period? The intervention studied was called Getting Started, and is one initiative within a larger and longer-term regional-scale industry development project called the Alpine Valleys Dairy Pathways project. This study is based on in-depth interviews carried out on ten farms, and on a debriefing interview conducted with the two consultant advisors who delivered the intervention. Section 2 below sets out the industry and policy context that gave rise to the Getting Started intervention, and describes the origins and design of the intervention itself. Section 3 describes the research study upon which this paper is based. Section 4 summarises key findings from the study and Section 5 applies these findings to discussion of the two research questions posed at the beginning of this paragraph.

2. Background

2.1 Succession, farm transitions and the Australian dairy industry

Dairying is Australia's third largest agricultural industry in terms of product value. Approximately 6,100 farms produce around 9.5 billion litres of milk annually, with a farm gate value of A\$4.7 billion (€3.1 billion). Average herd size is 284 cows (Dairy Australia 2016a). The Australian dairy industry continues to see potential for export growth, and hence both industry stakeholders and governments are interested in supporting the continuance and expansion of farm businesses (Horizon2020 2013). For some eight years now the Australian dairy industry has had a particular interest in the future of the industry's farm workforce, inclusive of both farm owners and farm employees (Nettle *et al.* 2008; Nettle and Oliver 2009; Santhanam-Martin and Nettle 2014). Dairy farmers are younger on average than farmers in other agricultural sectors in Australia, but nevertheless the population of dairy farmers is ageing, and this is of concern to industry stakeholders (Dairy Australia 2011). Stakeholders are concerned too that surveys typically show less than half of farm owners having documented farm succession or transition plans in place (Dairy Australia 2011). In its advisory materials, the dairy industry uses the terminology of "Planning for the Future" to encompass its view that within-family succession is only one of many possible pathways into the future for farm business, and also to reference that there are many different component processes, affecting different individuals, that may need to happen in order for these pathways to be navigated. Recognising that the industry's future depends on farm businesses being able to navigate these pathways successfully, the dairy industry is actively exploring different modes of intervention that may assist (Dairy Australia 2016b).

2.2 The policy and institutional context for intervention

Australia's agricultural policy context can be described as strongly neoliberal, and competitive-productivist (Dibden *et al.* 2009; Burton and Wilson 2012; Lawrence and Campbell 2014). Both policy *purpose* (what agricultural policy seeks to achieve) and policy *method* (how this purpose is enacted in institutions and their activities) are relevant context for this study. State and Federal governments in Australia continue to pursue agricultural production growth and export growth as their overriding policy goal, but seek to achieve this through the mechanisms of free trade, private sector leadership and market competition, rather than through state intervention (Dibden and Cocklin 2010; Santhanam-Martin 2015).

Therefore, it is dairy industry organisations, rather than government agencies, that are expected to, and indeed do, take responsibly for industry stewardship. Elsewhere I have characterized this form of industry governance as "industry in the lead" (Santhanam-Martin 2015). There are three different groups of dairy industry organisations: (1) the milk processing companies that buy milk from farmers (the largest of which is a farmer-owner co-operative); (2) the industry advocacy organisations that

represent the dairy industry in the public arena and in policy and regulatory processes and (3) the industry “services organization”, Dairy Australia, which invests compulsory farmer levies and matching federal government grant funds in research, development and service delivery. It is Dairy Australia which is leading effort in the Australian dairy industry to understand and respond to issues around farm succession and farm business transitions. Dairy Australia, through its regional-scale service delivery partner Murray Dairy, provided funding for the Getting Started intervention, which was intended as a pilot study to generate learning on how to approach the task of supporting dairy farm families with succession planning. To capture this learning, Dairy Australia funded the research study upon which this paper is based.

2.3 The Alpine Valleys Dairy Pathways Project & the Getting Started farm succession intervention

The Getting Started farm succession planning intervention took place in 2015 in the Alpine Valleys region of the Australian state of Victoria. This region is located in Australia's temperate-climate south-east corner (see Figure 1). It is bounded to the south by the peaks of the Victorian Alps, which reach above 1,600m elevation and receive winter snow, and to the north by the upper reaches of the Murray River, a tributary of Australia's largest river system. The region covers approximately two million hectares, of which approximately 600,000 hectares is used for agriculture. There are currently around 180 dairy farms in the region, all run as family businesses. Cows graze outdoors throughout the year on a mixture of irrigated and rain-fed pastures. Outside of two major urban centres, agriculture is the region's largest employment sector, but employs only 15% of the labour force. Dairying is the second largest agricultural industry (after beef and sheep grazing) in the region, both in terms of people employed and farm-gate value of production.

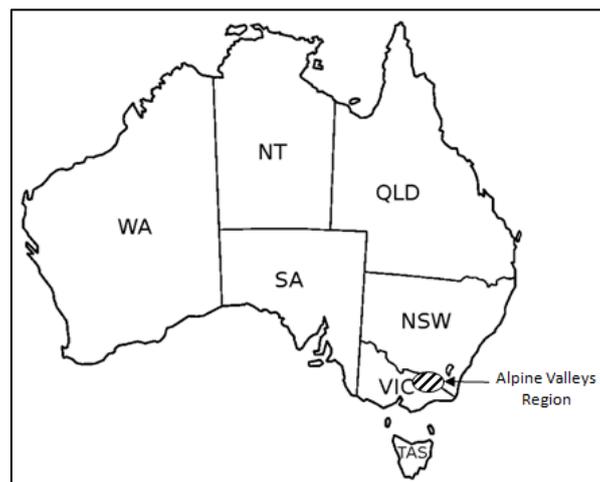


Figure 1: Location of the Alpine Valleys Region in the Australian state of Victoria

Since 2011, a consortium of community, government and dairy industry organisations has been conducting a collaborative industry development project in this region called the Alpine Valleys Dairy Pathways (AVDP) project. The overall aim of this project is to put the region's dairy industry on a growth trajectory, which the collaborating partners see as a desirable outcome for local communities, for government and for industry (Bridge 2014). The project involves a range of activities across several domains including farmer education, workforce development and community development. Within the workforce development domain, farm business transitions, including farm succession planning, has been an area of particular interest. This is a response to an observation made by local dairy factory field officers in 2011 that up to a third of farms in the region could potentially cease dairying in the medium-term, with the absence of a family member wanting to take over the farm being the main risk factor in more than half of these cases.

In 2014 the AVDP project secured funding from Murray Dairy, the regional service delivery partner of industry services organisation Dairy Australia, to trial a new advisory intervention aimed at identifying

and assisting farm families who wanted to take action on succession or transition planning, but who didn't know where to start. A private consultant was contracted to deliver the intervention. In February 2015 a simple survey was distributed by post and email to all 183 dairy farm businesses in the region. The survey was addressed to the current registered business owner, which in the vast majority of cases corresponds to the senior generation on the farm. The survey's eleven questions collected basic farm physical and demographic information and information on the current status of the farms' succession or transition planning. The final question asked "Would you like support with developing and/or reviewing your farm succession arrangements?" The survey elicited 86 responses (43%). Key findings from the survey included: only 24% of responding farms had a documented succession plan in place; 50% had discussed their plans with one or more professional advisors; 53% reported knowing what they would like to see happen in relation to succession or transition and 59% had discussed succession or transition with other family members. The project steering group interpreted these results as meaning that less than 30% of dairy farms in the region have an effective succession agreement in place, and set a goal of raising this to at least 50% over the next few years.

Fifteen out of 86 survey respondents answered "yes" to the final question, and were subsequently contacted by one of two consultant advisors. One of these fifteen later withdrew leaving a final cohort of fourteen participating farms. Participating farmers were not asked to contribute directly to the cost of the service, but most understood that they had in fact already made a small contribution indirectly, since the intervention was funded from industry R&D levy funds. If the cost of the Getting Started project had been recovered directly from the participating farms the cost per farm would have been about A\$2,000.

The next step involved a semi-structured interview between the current farm owners (usually as a couple) and one of the project consultants. These interviews collected more detailed information about farm and family financial status, farm business performance, the make-up of the farm family and any other involved parties (e.g. long-term employees), current owners' vision for the future, succession planning activity already undertaken and relationships with profession advisors including accountants and legal practitioners. The interview also sought to identify a series of agreed next steps for the farm owners to take in order to progress toward their vision for the future. These steps could include the Getting Started consultant providing further information in response to particular questions that arose in the interview and could also include a request from the farm owners for the Getting Started consultant to interview other family members or involved parties. The project consultants compiled all the information from the initial interview with the farm owners, and from any subsequent interviews with other parties, into a document called a "Stage 1 Succession Planning Report". My research study commenced at this point: when the initial round of interviews with the project consultants had been completed and the resulting succession planning reports had been provided back to the farm owners.

3. Methods

The project consultants contacted all the participating farms to ask if they were willing to participate in a research exercise designed to capture learning from the intervention. Twelve of the fourteen participating families were willing to participate and in September and October 2015 I completed interviews on ten of these twelve farms¹. Eight interviews were with the current farm owners (older generation) only. One was with the in-coming younger generation farmer only. On the tenth farm I spoke to one of the children as well as the current farm owners, in two separate interviews. At the conclusion of the farm interviews, I conducted a debriefing interview with the two project consultants. The key questions that I was asked to investigate by Dairy Australia were:

1. Does a short term intervention to set family businesses on the right track assist with more businesses reaching agreement on their farm transition arrangements?

¹ On the remaining two farms it proved impossible to find a suitable time to carry out the interviews within the timeframe available for the research.

2. What features of the intervention facilitated the successful engagement of farm families?²
3. What lessons emerge from the experiences of both the families participating in the trial intervention, and the consultants who delivered the intervention, to inform further development and implementation of similar interventions?

I designed a semi-structured interview schedule to elicit data in relation to these questions. The interviews with farm families lasted from thirty to sixty minutes, and the debriefing interview with the consultants lasted two hours. All the interviews were audio-recorded and subsequently transcribed, to facilitate thematic analysis. In this paper I have extended the analysis carried out for Dairy Australia to provide insight into the scholarly research questions posed in Section 1 above:

1. what type of advisory intervention is helpful in assisting families to get started with succession planning?; and
2. what are the implications for agricultural policy if one takes seriously the finding that succession planning is indeed a process that takes place over an extended period?

4. Findings

In this section I present salient findings from thematic analysis of the farmer interviews and consultant debriefing. I have structured these findings as responses to a set of questions targeting the key matters of interest to the research sponsors.

Why did people choose to take part in this activity?

The most common answer to this question was that the service offering came at the right time:

“Our son had just said ‘look, I think I want to come home’, and [the survey] came around the next day, so I ticked the box!” (Interview 7)

Farmers also noted that the initial survey was quick and simple to complete. Thus, the activity offered a low-risk and small-scale way to engage with a task that people understand to be important, yet large and difficult. One of the consultants described the nature of the Getting Started service as an opportunity to “put a toe in the water”. Some people mentioned that they had known the consultant who worked with them on this project for a long time and that gave them additional confidence to opt in, and some people noted that it was a process originating from dairy industry organisations, rather than government or private businesses, and that gave them confidence, but these factors were not critical. More important was that it offered them help with an issue that was front of mind for them at that time. It was also very attractive that this was a service that would come to them, in their homes, and at a time that worked for them, and that it was a free service. Some people saw this service as a natural next step from the general information on succession planning that they had received at various information days and meetings over the years.

Has the activity been useful/helpful?

All the people I interviewed felt that the activity had been useful. Every farm faced different specific issues, and farms were at a variety of points on the farm transition journey from “done nothing” to “have been thinking and working on this for years”, but everyone reported that this activity helped them to make progress. Everyone said it was a good use of their levy funds and that it should be continued or extended.

What was it about the process that was useful or helpful?

Points noted included:

- The sequence of questions in the interview was logical, and the questions themselves were good at stimulating new thinking;

² By the time I was commissioned to undertake the research, relevant Dairy Australia staff had already formed the view that the Getting Started intervention had achieved a better than expected quality and quantity of engagement with farmers that was therefore worthy of further investigation.

- The interview stimulated talking and thinking about things that people knew they should be working on, but which had been placed in the “too hard basket”;
- New aspects of the succession/transition process came up that hadn't occurred to the farm owners before;
- The interview identified options as to different succession and transition pathways;
- Very useful that the consultant was able to talk to the children independently of the owners;
- Very useful to get everyone's needs and priorities down on paper in a formal way, rather than having to rely on assumptions and general ideas.
- The final report was seen as a good document to support further activity, including family discussions and discussions with other professionals.

Were there things about the consultants that helped?

- It is helpful when the consultant is someone people have known for a long time – but for the majority of participants this was not a critical issue. The skills and approach of the consultant are more important.
- Consultant came and sat at the kitchen table. Spent time – not rushed.
- Consultant needs to know about the world of the dairy farmer.
- Consultant needs to understand the world of business.
- Consultant needs to provide unbiased advice in terms of looking after each of the interested parties in the family.

Were there any problems with the process?

For one farm out of ten, there was some frustration that the process couldn't take them further. They still feel stuck and unsure how to progress. This created frustration for the consultant too. This situation arose out of the way that this consultant interpreted the boundary around the service that they had been contracted to provide. This issue of setting an appropriate boundary around the service is discussed further below.

What has the intervention achieved for the participating farms?

For every farm but one the intervention has helped them to move along the farm transition journey. There are a set of next steps that they understand, support and are working on. The specifics are different for every farm. Examples of progress achieved (presented below as paraphrases of the interview data) are:

- I know more about the options for progressing toward retirement, and am seeking further information – but I will still need to make a final decision on how to proceed;
- There is a process underway now to get our son progressively more involved in the farm business;
- We now know more about our children's expectations and aspirations and can consider the options – and decide on next steps - with this knowledge in mind;
- Our transition process was already underway, but there were aspects that we hadn't thought through in enough detail. The chances of success have been improved by the extra level of detail reached through this process;
- Several farms reported that new connections had been established with other appropriate professionals, in order to progress the agreed next steps (farm management consultants, legal, financial);
- Several farms reported that the process had focused new attention on farm business performance including profitability, as business profitability was emerged as a key enabling factor for succession to occur.

There were a small number of farms where the interview process highlighted a problem or issue that the farm owners had not really known about before, so there is a sense in which the project appears to have made things harder rather than simpler. However in these cases the issue was always present and would emerged at some stage. These owners reported that by bringing a somewhat hidden issue to their attention the Getting Started intervention has given them a better chance of finding a solution and minimising conflict.

Is this a service you would pay for?

Farm owners reported that they are happy in general to contribute to the cost of services they use. However, if this initiative had involved a direct cost to the farmer at the beginning, most would not have proceeded. If the cost was >A\$1,500 then most likely nobody would have opted in. If it was A\$500 - A\$1000 there may still have been 5 or so participants. Having now been through the process people can see that it is of value, but nevertheless the fact that it was offered as a free service was definitely a key feature that encouraged participation.

The next three questions relate specifically to the reflections of the project consultants.

What is the appropriate boundary around what a “getting started” service should provide?

This is a complicated question that was discussed at length in the debriefing interview. The two consultants had in fact set the boundary quite differently. The first consultant described his approach as one of setting a “strict” boundary based on what he understood to be content of the service as set out in the project funding agreement. He saw his job as to (i) provide information to the client about what is involved in succession planning and (ii) to document the current situation of the farm in the form of the Stage 1 Report. The Stage 1 interview report also identifies agreed next steps for the clients to take, but this consultant’s interpretation of the boundary was that it was not his role to support the client in taking those further steps. He saw this activity as being of a much more limited scope than a “full” succession plan. He saw it as being an initial discussion that would identify the range of issues that would need to be addressed *if* the family decided to proceed to a full succession planning process. He reported that in a couple of cases setting this boundary left him feeling frustrated, because he knew that he had not done enough to get the farm transition process moving.

The second consultant’s interpretation of the boundary of the “Getting Started” service was that his involvement should continue until one or more of the next steps were actually underway. In many cases the agreed next step was to start work with another advisor of some kind (e.g. an accountant, a lawyer, or a farm management consultant), and so this consultant saw his role as continuing up until that next relationship and piece of work had commenced.

There are further questions that arise based on how the boundary around this service is set:

- Is it responsible to get a family started on farm succession discussions if the support is not necessarily there to deal with issues and conflicts that may arise?
- If this activity has more flexible boundaries, and involves industry subsidy, will it be seen by other professional service providers as unfair competition? On this point, both consultants noted that to date the activity has in fact generated more work for other service providers, rather than taking work away.

Does the fact that this intervention was funded by the dairy industry introduce a conflict of interest for the consultants?

The consultants raised a concern that there is the potential for the interests of a particular farm family and the interests of the wider dairy industry to be divergent. For example industry organisations might prefer to see a particular parcel of land remain available for milk production, whereas the life plans of the owners of that land might be best served by changing to an alternative land use. Both consultants felt strongly that they would only be willing to be involved in an activity like this on the basis that the interests of the farm family are paramount. However they also commented that:

- Many dairy farm families themselves have a strong personal commitment to the dairy industry, and hence are keen to consider options that allow them to remain involved with dairying in some way.
- Where industry funding is involved, it is appropriate that this be made explicit in promotional material. Potential participants who have an aversion to the dairy industry can then decide not to participate because of this connection.

- Having consultants involved in the activity who understand what options might be available within dairy means that these options are available for consideration, where they might not be if the consultant did not have this specialist knowledge. This does not constitute a conflict of interest.

There are some examples amongst the fourteen participating farms where a conflict of interest could have emerged. In each of these cases the interests of the family formed the basis of the agreed next steps, and in some cases the family themselves expressed a preference for options that retained a dairy link.

What is the appropriate measure of success for an intervention like this?

The consultants agreed that having a completed farm transition document or plan is not the appropriate measure of success for an intervention like this. A more appropriate measure would consider (a) whether a discussion about succession planning is underway within the family, and (b) whether working relationships have been established with one or more appropriate professional service providers, so that the discussions can progress.

5. Discussion and Conclusions

The first research question this paper posed was: what type of advisory intervention is helpful in assisting families to get started with succession planning? My investigation of the Getting Started intervention found that it offers one model of a helpful service. Nine out of the ten farms that I had contact with are actively progressing with transition activity on their farms and reported that the Getting Started intervention had contributed to this activity. Key lessons from this success that could inform further development and implementation of similar interventions include:

- The Getting Started intervention offered a small-scale and low-risk way for farming families to “put a toe in” to the frightening and murky waters of succession planning. This seems to have helped lessen the well-documented resistance to starting succession planning discussions (Lansberg 1988).
- The selection of consultants to deliver the service is critical to its success. Attributes that participating farmers valued in the consultants included their breadth and depth of knowledge of farming and business practices in the particular agricultural industry concerned and their attention to the needs and interests of all interested parties.
- More generally it was the relational quality of the intervention that assisted its success. The consultants were individuals with some standing in the dairy industry and the region, who came to work with families in their homes. This contributed to creating a safe relational space in which difficult issues could be teased out in conversation.
- A service like this needs to be offered to a target population of farmers repeatedly at regular (e.g. annual) intervals, to capture participants as transition issues come to the top of their agenda.
- The goal of the service should be about getting a process started, or to keep it moving, and not about producing a document. This introduces some complexity in defining the scope of the service to be provided, and in costing the service.
- Signposting and brokering relationships with other professional service providers is a key service that a Getting Started intervention can usefully provide. Understanding and addressing any capacity constraints within advisory services is therefore another important element of supporting farm succession and transition processes for a given industry or region.
- In this Australian example, there was a clear reluctance on the part of farmers to pay for such a service up front, even though in retrospect they can see its value.
- It needs to be clear in the design and implementation of the service that it is the interests of the farm family, and not the interests of industry, that are paramount.

The second research question concerned the implications for agricultural policy of viewing succession planning as *process*. I will address this question in the specific context of Australia’s industry-led, hybrid agricultural advisory system, and leave it to others to determine how the findings can be translated into other contexts. If succession planning is a process that takes place over an extended period, then services and advice to assist with this process must be available in small “packets”, as and when required, rather than in the form of a single large and supposedly complete succession

planning service. A one-off planning service may be able to document at a particular point in time a preferred future state and what appears a feasible pathway towards it. But the evidence from this study is that families and their farm businesses are likely to encounter many unexpected diversions and sticking point as they progress. One can only see as far as one can see at any particular point, and as the journey continues, new obstacles and/or opportunities come into view.

One possible industry policy response to the long-term process nature of succession is for succession and transition planning advice to be woven in to other advisory activities and service offerings that farmers already engage with regularly. This could include their interactions with their farm management consultant (if they have one) or with their milk factory field officer. This then requires these advisors to have the skills and knowledge to engage usefully with farmers on succession issues, it requires these individuals to be proactive about raising succession issues for discussion, and it requires them to be able to direct farmers to other more specialist services that might be needed at any particular time. The work required by industry is firstly to design succession planning into these other advisory interactions, and secondly to build the skills and knowledge of the advisors involved.

A second possible response that is to include a specialist succession planning service like Getting Started in an industry's portfolio of service offerings, alongside for example its services on grazing management and milk quality. The study report here has shown that a focused one-on-one advisory service delivered by a skilled generalist agricultural advisor can effectively assist farm families to identify the specific advice they need next, and can assist in brokering a connection to this advice.

While the cost per farm for the Getting Started service was modest (~A\$2,000), the industry service organisations currently do not consider it economically feasible to offer this as a free service to all 6,100 Australian dairy farms, even accounting for the fact that only a small portion of this number would want to access the service in any given year. Dairy Australia's desire is that over time a service like this will come to be seen by farmers as a normal and essential part of farm business operations, in the same way that the services of a vet or refrigeration mechanic are, and thus that willingness to pay will increase. This may indeed occur. But for now, unless resources are provided to support farmers to take the initial steps in tackling succession issues, it appears likely that the well-documented resistance to this activity will prevail, and the industry-scale issues linked to poor succession planning will continue.

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