

Ben and Roger need to independently and honestly answer each question. They must record what the situation actually is, from their point of view, not what they want it to be or what it will be at some unspecified time in the future. Their problem exists now, not in the future. And, if their problem is not solved, the future they both desire will never come to fruition.

Upon completion of the transfer of management questionnaire they must discuss the results, recognize the changes that need to be made, and develop and implement a plan to bring about that change. Roger and Ben need to set a date, time, and place to resolve this matter. It cannot be left for discussion when they have nothing to do; for in an active farm family business there is always something that needs doing. It would be advisable to select a location to meet other than the farm so that they will not be interrupted. Ground rules should be agreed upon prior to the meeting and should, at a minimum, include the following:

1. **Listen to learn.** Keep an open mind and practice active listening. Take notes and ask questions to clarify anything that is not understood.
2. **Do not interrupt.** Exhibit good manners by allowing everyone the opportunity to finish what they have to say.
3. **Critique the message and not the messenger.** Focus on the content of the message and not on the character of the messenger.
4. **Trust the process.** Approach the problem with a positive attitude. Problems have solutions and the solution will be discovered only by honest, frank discussions.
5. **Be sincere.** You need to be honest in your comments and expect honest comments in return.

Lastly, and perhaps most importantly, seek the assistance that you need to facilitate a discussion of the problem. The **Beginning Farmer Center**, from Iowa State University Extension and Outreach is available for assistance as a neutral party to facilitate family discussions (www.extension.iastate.edu/bfc/).

For more information on making farm transitions work, visit the **Ag Decision Maker Transition and Estate Planning webpage**, www.extension.iastate.edu/agdm/wdbusiness.html.

Table 1. Transfer of management worksheet

Select the degree to which you feel the following management responsibilities are being retained by the owner or transferred to the successor. Select 1 if the decision is being made solely by the owner or select 5 if it is being made solely by the successor. If the responsibility is being shared select 2, 3, or 4 appropriately.

	Retained Transferred				
	1	2	3	4	5
1. Plan day-to-day work	1	2	3	4	5
2. Make annual crop/livestock plans	1	2	3	4	5
3. Decide the mix & type of enterprises in the long run	1	2	3	4	5
4. Decide the level of inputs to use	1	2	3	4	5
5. Decide timing of operations	1	2	3	4	5
6. Decide when to sell crop/livestock	1	2	3	4	5
7. Negotiate sales of crops/livestock	1	2	3	4	5
8. Decide when to pay bills	1	2	3	4	5
9. Decide type & make of machinery & equipment	1	2	3	4	5
10. Negotiate purchase of machinery & equipment	1	2	3	4	5
11. Decide when to hire more help	1	2	3	4	5
12. Recruit and select employees	1	2	3	4	5
13. Decide amount and quality of work	1	2	3	4	5
14. Supervise employees	1	2	3	4	5
15. Decide work method/way jobs are done	1	2	3	4	5
16. Decide and plan capital projects	1	2	3	4	5
17. Identify sources & negotiate loans & financing	1	2	3	4	5
18. Livestock management	1	2	3	4	5
19. Keep farm records	1	2	3	4	5