**Module 1: Getting Started with Farm or Ranch Transfer**

Teaching Plan

Overview/Purpose

This module introduces the *Transferring Land to a New Generation* curriculum and prepares participants to engage in a farm or ranch transfer process. Participants will identify key steps involved in a farm or ranch transfer; clarify their values, vision, and goals; name the people involved in their transfer; and assess their needs and the needs of those involved in their transfer. Participants also will practice thinking about the other person’s point of view, demonstrating trust-building behaviors, and listening.

**Prerequisites**

Readiness to engage in a farm or ranch transfer situation.

**Trainer Set-up Notes**

**WORKSHOP DELIVERY:** This workshop can be adapted to a wide range of environments. While best delivered in person in a room with audio-visual set up and a computer, it can be adapted to be delivered virtually, indoors, outdoors, with or without access to an internet connection.

**ESTIMATED TOTAL TIME:** 2 hours and fifteen minutes of student learning (not including case studies)

**WORKSHOP SET UP:** Trainers should review the Training Manual, Resources Lists and other materials ahead of time and prepare either digital or printed copies of the student handouts. Further, review the Storyboard and customize the slides with images, videos and talking points meaningful to your audience. If you have involved other presenters, be sure to collect their photos and logos ahead of time so that you can create the welcome slide. If you would like to show a case study, review the case study videos and activity guide ahead of time to determine the best fit for your audience and topics covered.

**WORKSHOP SUPPLIES AND EQUIPMENT:**

* Module 1 “Introduction” Storyboard and any case studies you might use
* Group note-taking tools
* Office hours sign-up sheet
* Student copies of:
  + M1 Student Learning Plan
  + Student Resources List
  + 10 key steps information sheet
  + Values Information Sheet
  + Vision, Values, and Goals Worksheet
  + SMART Goals Information Sheet
  + SMART Goals Worksheet
  + Needs Assessment Worksheet
  + Asset Inventory Worksheet
  + Skills to Build Trust Information Sheet
  + Cultivate Trust Worksheet

**What participants will learn**

**COMPETENCY**: Prepare to engage in a transfer process.

**LEARNING OBJECTIVES:**

1. Identify key steps of a transfer process.
2. Clarify your values, vision, and goals.
3. Name key people involved in your transfer.
4. Assess needs and assets of the parties involved.
5. Practice ways to strengthen key relationships.

**IMPORTANT ASSIGNMENTS**

* Complete the following Worksheets: Vision, Values & Goals, Needs Assessment, Assets Inventory, and SMART Goals.

### Workshop Activities

|  | Learning Activity | Teaching Notes | Materials/Supplies |
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| 1. | LEARNING PLAN OVERVIEW AND INTRODUCTIONS  Participate in introductory activities and review learning objectives. Review information detailed in the Module 1 Student Learning Plan. | PRIOR TO CLASS MEETING  Review Workshop Set-up Notes  TIME: 5 minutes  1. Welcome participants and introduce yourself and any other presenters.  2. Give a short presentation on what the training is about, acknowledging funders, and sharing the learning objectives.  3. Hand out and review the Module 1 Student Learning Plan and Student Resources List. | Module 1 Student Learning Plan |
| 2. | MOTIVATION ACTIVITY  Participate in a listening activity to introduce yourself to other participants and share your goals/expectations for the training series. | TIME: 15 minutes (Depends on the number of participants.)  1. Ask the group to break into pairs, preferably of people who don’t know each other well. Explain this is a way to get to know each other and to practice listening. Listening is an important communication skill that helps build relationships. We will emphasize it throughout the curriculum.  2. Ask the first participant to take 1 minute to introduce themselves sharing who they are, where they are from, what kind of farm/ranch or agricultural property they’re involved with, and one thing they hope to learn from the training.  3. Ask them to switch roles.  4. When both people have finished, bring the group back together and ask the pairs to quickly introduce each other based on what they heard.  5. Record what participants hope to learn on a flip chart and refer back to it during the training. | Group note-taking tools |
| 3. | COMPREHNSION ACTIVITY  View a presentation about the key steps in a farm/ranch transfer process. | Time: 15 minutes  1. Present the slides of Part 1: The Transfer Process | Module 1 Storyboard, Part 1 |
| 4. | PRACTICE ACTIVITY  Participate in an activity to determine where you are in the transfer process. | TIME: 5 minutes  1. Ask for a show of hands for each of the 10 steps so participants can identify where they are in the transfer process at this point in time.  2. Potentially record how many respond to which step in the process and use this to guide the emphasis and delivery of the training.  3. Make time for group reflection on this activity. Use the 10 key steps information sheet as a guide. | Group note-taking tools  10 key steps information sheet |
| 5. | COMPREHENSION ACTIVITY  View a presentation about vision, values, and goals. | TIME: 15 minutes  1. Use Part 2: Values, Vision, Goals storyboard to explain the importance of clarifying values, vision, and goals as they embark on a transfer process.  2. Hand out the Values Information Sheet and Vision and Values Worksheet.  3. Ask participants to review the Values Information Sheet and then to very quickly “popcorn” their values in a round robin exercise. Allow people to “ditto” or share the same values. During the exercise, record their values on a flip chart.  4. Continue using the storyboard to explain Vision and Goals. | Part 2: Values, Vision, and Goals Storyboard  Group note-taking tools  Values Information Sheet  Vision, Values and Goals Worksheet |
| 6. | PRACTICE ACTIVITY  Participate in an activity to draft a values statement, vision statement, and goals. | TIME: 10 minutes  1. Ask participants to complete the Vision, Values and Goals Worksheet.  2. Explain that they will be asked to fill out the SMART Goals Worksheet as homework. | Group note-taking tools  Vision, Values, and Goals Worksheet  SMART Goals Information Sheet  SMART GOALS Worksheet |
| 7. | COMPREHENSION ACTIVITY  View a presentation about your needs and the needs of others involved in your transfer. | TIME: 15 minutes  1. Use Part 3: Assess Your Needs and Needs of Others Involved in the Transfer of the storyboard to explain the importance of clarifying what you need and have, as well as what others need and have in a transfer situation. | Part 3: Assess Your Needs and the Needs of Others Involved  Storyboard  Group note-taking tools |
| 8. | PRACTICE ACTIVITY  Complete the needs assessment worksheet. Share your work with a partner and give each other feedback. | TIME: 20 minutes  1. Hand out the Needs Assessment Worksheet.  2. Ask participants to take 15 minutes to begin to fill them out. (If they don’t finish, they could finish as homework.)  3. Bring the group back together to answer questions and discuss key themes. Encourage conversation about who is involved in their transfer and what they need. Prompt for insights about how to build and sustain relationships with these people to facilitate their transfer.  4. Hand out the Asset Inventory Worksheet to assign as homework. | Needs Assessment Worksheet  Asset Inventory Worksheet |
| 9. | COMPREHENSION ACTIVITY  View a presentation about strengthening relationships. | Time: 10 minutes  1. Use Part 4: Strengthening Relationships in the storyboard to discuss aspects of trust, relationship building, and communication in a transfer situation. | Part 4: Strengthening Relationships |
| 10. | PRACTICE ACTIVITY  Complete the Trust Worksheet and discuss your results with a partner | Time: 15 minutes   1. Hand out the Trust Worksheet and ask participants to take 10-15 minutes to complete the worksheet independently. 2. Ask the participants to group into pairs and discuss their results with a partner. | Skills to Build Trust Worksheet |
| 11. | APPLICATION ACTIVITY  View the wrap up of Module 1. Receive any homework that may be assigned and make time to complete it. | Time: 10 minutes  1. Present the final wrap up slides in the storyboard  2. Remind participants to review SMART Goals Information Sheet and complete the SMART GOALS Worksheet, and ask participants to complete this for homework  3. If participants did not complete the Needs Assessment and Asset Inventory worksheets, ask them to complete for homework.  4. Finally, distribute the student resource list if you haven’t already. | Student Resource List |