

PLANNING TO PLAN

For many farms, including the next generation in the management and planning will be a shift in how and when issues are discussed and decisions are made. The owner generation has been making decisions on their own or with a spouse or partner for years, probably decades. These discussions take place informally, as people are working together, driving together, or even just before bed. While these discussions worked with one or two decision makers, they probably will not work as you bring others into the business.

Operational meetings should happen often, be relatively short in duration, and involve those engaged in the day-to-day operation of the farm. Meetings should happen once a week for 30 minutes to an hour to discuss the tasks for the week. Set a time that works for everyone, be consistent in meeting at that time, and, if there isn't a lot to cover, adjourn the meeting early rather than canceling it. Consistency is key.

Strategic planning meetings should involve key stakeholders, including spouses or partners who may not be involved daily but are affected by the big decisions that are made. These will be less frequent but longer meetings. Again, setting a time that works for everyone is important. Provide an agenda beforehand so people know what to expect.

Meeting agreements, sometimes called meeting ground rules, can keep your meetings grounded in the tasks at hand and help you all learn how to interact in new roles as business partners rather than just as family members. Example meeting agreements can be found on the next page.

Start planning your consistent meetings by answering these questions:

OPERATIONAL MEETINGS

1. How often do we want to meet for operational discussions? _____
2. What is the best day and time for these meetings? _____
3. How long should these meetings be? _____
(Hint: If meeting like this is really new, even a 10- or 15-minute meeting that is consistent can help with communication.)
4. Who should be involved at all meetings? _____
5. What are the topics we will cover? (Examples: weekly work flow, tasks that need to be completed, scheduling shifts, time off)

STRATEGIC PLANNING OR SUCCESSION PLANNING MEETINGS

1. How often do we want to meet for strategic discussions? _____
2. What is the best day and time for these meetings? _____
3. How long should these meetings be? _____
4. Who are the key stakeholders who should be included? _____

Example Meeting Agreements

- Start and end on time.
- No cell phones.
- No side conversations or comments.
- Everyone is encouraged to participate.
- Listen without judging; hear each other out.
- Determine what stays within the group and what can be shared, and who it can be shared with.
- Stick to the agenda.
- Honor the commitments and decisions made by the group.

Our Meeting Agreements

A few other meeting tips:

- Rotate meeting leadership.
- Record and share meeting notes, action plan.
- Begin each meeting with everyone sharing something that has recently gone well on the farm.
- Use the meeting time to give compliments for jobs well done.
- Food always helps!

Example Meeting Agenda

Name of the farm:

Location of the meeting:

Date: _____ Time: _____

AGENDA

1. Call to order – (name of person running meeting)
2. Standing reports (something always on the agenda)
 - a. Herd report
 - b. Crops/fieldwork report
 - c. Financial report (may or may not be on every operational meeting agenda)
3. Weekly task discussions
4. Agenda items carried over from last meeting
5. Review action items from succession planning meeting and give updates on what was done, and share information learned from those action items
6. Other items
7. Next meeting will be led by – (name of person)
8. Adjourn

Next meetings:

- Operational or check-in meetings: Every Monday at 6:30 a.m. during breakfast at Mom & Dad's house for 45 minutes
- Strategic or succession planning meetings: Third Wednesday of every month at the County Extension office between 1 and 3 p.m.

Our Meeting Agenda

Name:

Location of the meeting:

Date: _____ Time: _____

AGENDA

1. Call to order – _____
2. Standing reports (something always on the agenda)
 - a. _____
 - b. _____
 - c. _____
 - d. _____
3. Weekly task discussions
 - a. _____
 - b. _____
 - c. _____
 - d. _____
5. Agenda items carried over from last meeting
 - a. _____
 - b. _____
 - c. _____
 - d. _____
5. Review action items from succession planning meeting and give updates on what was done, and share information learned from those action items
 - a. _____
 - b. _____
 - c. _____
6. Other items
7. Next meeting will be led by _____
8. Adjourn

Next meetings:

- Operational or check-in meetings:
Every _____ at _____ for _____ minutes
- Strategic or succession planning meetings:
Every _____ at _____ from _____ to _____