

A LAND LINK FOR WESTERN MONTANA:
KEEPING LAND IN AGRICULTURE FROM ONE GENERATION TO THE NEXT

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Passing Farms and Ranches on to the Next Generation: Establishing a Land Link Matching Service in Western Montana

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Western Montana's agricultural land is rapidly being developed in the wake of an increasing population and aging farmers and ranchers. The subsequent high land values make it difficult for producers to access agricultural land. The Community Food and Agriculture Coalition has prioritized the creation of a land link matching service to help connect farm and ranch owners with people looking for agricultural land to expand or start production operations.

This professional paper aims to provide the first step towards this objective by exploring how a matching service might be designed, administered and implemented. The research has two components: 1) to learn from existing land link programs about their strategies to facilitate farm and ranch transfers and suggestions about starting a matching service, and 2) listen to landowners' reactions and thoughts about how a land link might encourage their participation and meet their needs and concerns. Six existing land link programs were analyzed through informal interviews of their directors and staff. Twenty-four of the region's farm and ranch owners were informally phone surveyed. Based on the perspectives of western Montana's farm/ranch owners and land link professionals, the report concludes by outlining recommendations and options for establishing a matching service in western Montana.

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INTRODUCTION

Overview

As western Montana houses a growing population, it is increasingly difficult for farmers and ranchers to access agricultural land. Development is converting fertile soil into houses, strip malls and parking lots, and we are consuming more and more acreage per person. The agricultural land that remains carries a price tag reflecting its development value, far exceeding what a producer can afford by growing food. Meanwhile, the region's farmers and ranchers are getting older. As farmers and ranchers retire, their properties often find non-agricultural buyers.

These problems are not unique to western Montana. Many growing communities across the U.S. are also struggling to keep agricultural land intact and under the stewardship of farmers and ranchers. To approach a solution, some have established land link programs to facilitate farm and ranch transfers. What they all have in common is a matching service, which simply connects landowners, who want to see their land farmed or ranched, with producers seeking access to fertile soil.

The Community Food and Agriculture Coalition¹ (CFAC) has prioritized the creation of a land link matching service to help bridge farm and ranch owners with people looking for agricultural land to expand or start an agricultural operation. CFAC grew out of the Community Food Assessment of Missoula County and is a multi-stakeholder coalition that aims to systemically enhance the County's food security. Under a USDA grant, I have been working with CFAC and its Farmland Protection and Economic Viability of Agriculture Committee as a research assistant. We conducted this research project to explore the possibilities of designing, implementing and administering a matching service for Missoula and adjacent counties of Flathead, Granite, Lake, Mineral, Powell, Ravalli, and Sanders.

It is important to state upfront that a matching service cannot single-handedly forestall the development of farm and ranchland, equalize the market and agricultural values of land, or make farms and ranches viable businesses. A matching service is simply a conduit to link landowners—including retiring producers and non-agricultural

¹ <http://www.umt.edu/cfa>

landowners—with farm and ranch seekers as well as a resource to help these parties see all of their options for keeping agricultural land in production. Though a small piece of a much larger puzzle, a matching service could be a critical resource in keeping land in agriculture, generation to generation.

The Problem: Loss of Agricultural Land-Base & Producers' Ability to Access It

Already, many of western Montana's farms and ranches have been transformed into non-agricultural uses, and development continues to threaten our most fertile soils. Between 1960 and 2000, Missoula County's population grew by 114%.² In roughly the same timeframe, from 1954 to 1997, the acres in agricultural production decreased 34%. Furthermore, the increasing population is consuming the landscape less efficiently. From 1970 to 2004, the population grew 70% while the amount of land developed increased 228%.³ This suggests there are many residential properties containing acres of fertile land that are not being used to grow food.

Inefficient residential growth is especially problematic in western Montana because of the region's topography and ownership patterns. Montana at large is just under 60% privately owned, but Missoula and the adjacent counties are each composed of less than 50% privately owned land—and only 21.84% private land combined when Plum Creek is removed from the equation.⁴ That means most of the landscape in Missoula's immediate foodshed is protected from development. Most of that land, however, is unsuitable for agriculture due to steep slopes. Thus, the properties that have the most potential for local food production are also the most susceptible to development pressures. This private land could help feed our community should a farmer or rancher gain access to it via a lease, purchase or other arrangement between the landowner and producer.

² Hassanein, Neva and Maxine Jacobson, editors. 2004. *Our Foodshed in Focus: Missoula County Food and Agriculture by the Numbers*. Missoula County Food Assessment.

³ Corday, Jacquelyn. 2006. *Missoula Urban Area Open Space Plan*. Draft 6/26/06.

⁴ Calculations are based on Montana Natural Heritage Program's data, taken in February 2003, and presented by the Montana's Natural Resource Information System http://nr.is.mt.gov/gis/requests/county_own.html.

A fundamental challenge with keeping fertile land under the stewardship of producers is that humans are mortal. A farm or ranch has to survive the passage of multiple generations, each generation transferring the operation successfully to the next. Complicating matters, the average age of western Montana’s farmers and ranchers is rising rapidly, perhaps fueling the conversion of agricultural land. For example, in 1982 the average age of farmers and ranchers in Missoula County was 49 years.⁵ The average age had risen to 56 years in 1997 and reached 57 in 2004.⁶ The surrounding counties—Flathead, Granite, Lake, Mineral, Powell, Ravalli, and Sanders—also have similar average ages of principal agricultural operators, ranging from 55 to 58 years.⁷ In a 2004 survey of 52 producers in Missoula County, the most common response to the benefits of development pressure was the ability to sell the land at a higher value.⁸ One participant put it plainly, “Our retirement is in the land value.”

Though not well documented, the next generation of farmers and ranchers is looking for land. The University of Montana’s Program in Ecological Agriculture and Society (PEAS), for instance, is an educational farm and sees many young interns who are eager to learn about agriculture. One recent PEAS graduate started her own operation this year, and others have expressed interest in starting agricultural businesses. Another example is the Hmong community, which account for 40% of the vendors at Missoula’s Farmers’ Market.⁹ Many of their vegetables are grown on leased land, which is often sold and subdivided beneath their crops, thus forcing Hmong farmers to continuously seek access to fertile land. And that is the issue at hand: how can we keep agricultural land in production, while producers retire and fertile land is subdivided at alarming rates?

Part of the Solution: a Land Link Matching Service

Facing similar trends, twenty states and regions, from California to Maine, have established land link programs to connect farm/ranch owners with farm/ranch seekers.

⁵ Hassanein, Neva and Maxine Jacobson, editors. 2004. *Our Foodshed in Focus: Missoula County Food and Agriculture by the Numbers*.

⁶ City-data.com. 2004. <http://www.city-data.com/city/Montana.html>.

⁷ Ibid.

⁸ Hassanein, Neva and Maxine Jacobson, editors. 2004. *Food Matters: Farm Viability and Food Consumption in Missoula County*. Missoula County Food Assessment.

⁹ McCourt, Nancy, Jason Seagle and Jen Jones. 2004. “Hmong Market Vendors: Lessons From A Focus Group.” *Food Matters: Farm Viability and Food Consumption in Missoula County*.

These programs aim to: 1) help keep land in agriculture via connecting retiring producers to current or aspiring farmers and ranchers; and 2) bring fertile land that has been taken out of agriculture back into production via sales, leases and other arrangements between non-agricultural landowners and producers. Maine FarmLink, for example, states its mission as the following:

Maine FarmLink is a farm transfer program that connects farmers seeking farmland with retiring Maine farmers and farm owners who wish to see their agricultural lands remain active. Maine FarmLink's goal is to curb the conversion of Maine's farmland and to maintain the state's agricultural heritage for generations to come.¹⁰

Each land link organization has a slightly different purpose, but at their core all hold the central goal of keeping farm and ranchland in agriculture through facilitation of land transfers. The basic resource of such land link programs is a matching service, which gathers and disseminates information from both farm/ranch owners and farm/ranch seekers. Some land link professionals refer to it as a "dating service," as it facilitates the courtship of two parties and informs each about what the other brings to the relationship.

Research Overview

Given the circumstances of agricultural land sprouting houses, farmers and ranchers aging and retiring, and producers searching for land access, the Community Food and Agriculture Coalition has prioritized the creation of a land link program for western Montana. This professional paper aims to provide a solid first step towards this objective, exploring how a land link might be designed, administered and implemented. The research had two main undertakings: 1) to learn from existing land link programs through informal interviews with their directors and staff, and 2) listen to landowners' reactions and thoughts about how a matching service might encourage their participation and meet their needs and concerns.

The first chapter provides the bulk of the research, examining how six existing land link programs operate, including the insights and suggestions of their directors and staff. Rather than re-inventing the wheel, it made sense to start with these models and learn from the people who administer them. The land link professionals' perspectives

¹⁰ Maine FarmLink Homepage. Checked September 5, 2006. <http://www.mainefarmlink.org/>

were gathered during presentations at the National Farm Transition Network 2006 annual conference, informal interviews and conversations over the phone and email.

To tailor a matching service to western Montana, it was important to hear what at least some of the region's landowners think about the idea. Chapter Two discusses farm/ranch owner perspectives through an informal phone survey of twenty-four landowners in Missoula and Ravalli Counties. Exit/entry issues are complex, and the survey's goal was not to unravel the finer details of a particular topic or make generalizations about what landowners think. Rather, the survey has revealed a range of reactions, concerns and suggestions landowners had about the concept of a land link.

The perspectives of farm/ranch seekers are also important to consider. For this professional paper, however, there was not enough time to thoroughly research their views. It was appropriate, however, to prioritize the landowners, based on two assumptions: 1) farm/ranch seekers will likely out-number landowners in the land link database, as is the case in all six of the existing land link programs I reviewed; and 2) the more farms and ranches in the database, the more appealing the matching service will be to seekers. Further research can follow up on how the land link is serving western Montana's farm/ranch seekers.

Based on the perspectives of western Montana's farm/ranch owners and land link professionals, Chapter Three outlines recommendations and options for a matching service's design, implementation and administration. CFAC can consider these suggestions when launching the land link and can modify the design and implementation of the land link as they deem appropriate.

Conclusion

Since the goal of this report is to start a land link matching service in western Montana, it focuses narrowly on this task. It should not be read, however, as a silver bullet strategy to keep agricultural land under the stewardship of farmers and ranchers. In fact, the directors of several land link programs made one thing crystal clear: the matching service alone will not produce dramatic results. Thus, many land links have evolved to include a variety of other resources, including: guides on farm succession planning, workshops on entering and exiting agricultural businesses, and technical

assistance for specific help. The majority of land links also partner with other organizations—from Extension to land trusts, the Farm Bureau to individual attorneys—to bring together various farm and ranch transfer strategies and resources. The point, here, is that a land link will have a better chance of serving our agricultural community if it is a tool coupled with other resources, organizations, and an eye towards the bigger picture. A good first step, however, is designing the matching service, which is what the rest of these pages set out to do.

CHAPTER 1: LESSONS FROM EXISTING LAND LINK PROGRAMS

Farm link programs are not a solution to all of farming's woes. They are not going to solve viability issues or high land prices, but they can address planned and orderly transfers of land.

~Marion Bowlan, Director of Pennsylvania FarmLink

Learning about Existing Land Link Programs

In 1990, Nebraska's Center for Rural Affairs developed the nation's first land link program to connect landowners and retiring farmers with aspiring producers.¹¹ The program was so popular, within two years the Center hosted individuals from eight other states to encourage them to develop similar programs. The National Farm Transition Network grew out of this meeting and is now comprised of twenty programs nationwide. All of these programs aim to preserve agricultural land, addressing the central question: how will agricultural land remain in production from generation to generation?

Each state's agricultural industry is unique, and land link programs have been tailored to their particular contexts to serve a region's landowners and beginning and retiring producers. Often, the matching services fit a niche within a state's larger agricultural sector. For example, in New York and Vermont, dairy is the number one industry in both states. New York FarmLink works mostly in the rural areas of the state, with large dairy farms and aspiring farmers looking to go into dairy. While Land Link Vermont also has many dairy farms enrolled in its database, there are not as many people pursuing these opportunities. Rather, seekers in Vermont tend to want access to smaller farms for vegetable crops, which they often direct market to population centers. Washington FarmLink and New Jersey Farm Link deal mostly with urban fringe agriculture.

To learn more about how we might design and implement a land link matching service in western Montana, I attended the National Farm Transition Network (NFTN) annual conference and the Risk Management Education training, much of which focused

¹¹ Knehr, Michael. 2000. *Passing on the Farm: A Review and Evaluation of the Center for Rural Affairs' Land Link Program*. Master's Thesis, Duquesne University.

on establishing a land link. I also informally interviewed¹² six directors and one staff member of such programs, including:

- California FarmLink (CaFL), Steve Schwartz and John Guardino;
- Land Link Vermont (LLV), Deb Heleba;
- Pennsylvania Farm Link (PaFL), Marion Bowlan;
- New Jersey Farm Link (NJFL), Dave Kimmel;
- New York FarmLink (NYFL), Steve Richards;
- Washington FarmLink (WaFL), Mary Embleton.

I also have also spoken with John Baker, director of the National Farm Transition Network. The information on existing land link programs is largely based on the informal interviews, and is supplemented by the conference and training presentations and the land link websites.

The data has been organized categorically, and unfolds in this chapter under the following themes: match making process, business arrangements, databases, administration and staff, funding and fundraising, partnerships, and promotion and outreach. The chapter concludes with the land link professionals' suggestions for starting a matching service.

Match Making Process

Overview

Each land link program has its own process for facilitating matches, though they all begin with farm/ranch seekers and landowners filling out applications. The information from the applications is then entered into a database. Next, some land links simply distribute that information to the farm/ranch seekers and landowners participating in the program. Others get more involved, visiting the farms and ranches and meeting with seekers and landowners to compare what they put on paper to what they say in person. As Deb Heleba, director of LLV, explained, "People do not always fill out the application according to their true interests." Steve Schwartz has found that landowners in California often exaggerate the agricultural value of their properties. Both CaFL and

¹² Six of the seven informal interviews were conducted in-person, and I had follow up conversations with most over the phone. One interview occurred entirely over the phone and email.

NYFL meet with seekers and landowners simultaneously on the farm or ranch, getting the most involved of the land link programs sampled.

Application

All of the programs have landowners and farm/ranch seekers fill out applications as a first step towards finding potential matches. The basic information in all of the landowner applications cover the following topics:

- Description of their land—including acreage, location, tillable vs. pasture, and whether the land is certified organic;
- Types of agricultural production the land has supported in the past;
- Kinds of business arrangements—e.g., lease, purchase, crop share, etc.—the landowner would consider;
- Equipment available;
- Descriptions of farming infrastructure and any buildings—including housing, fences, irrigation systems, etc.

Similarly, farm/ranch seekers provide information regarding:

- Description of the land qualities sought—including acreage, location, tillable vs. pasture, and organic certification;
- Infrastructure needed—such as fences, housing, and irrigation;
- Kinds of business agreements they would consider;
- Type of agricultural operation they plan on running;
- Resources they bring to a potential match—such as equipment, capital, livestock, labor, management skills, etc.

Some applications simply inquire about this concrete information. Others also ask participants about their values and objectives. For example, seekers might be asked why they want to farm or ranch and what their short and long-term business goals are. Mary Embleton said these open-ended questions are often useless and require a lot of time to enter their descriptive responses into the database. She does, however, find some value in gauging land link participants' prior experience and expectations when facilitating matches. Deb Heleba agrees that LLV went “overboard” on some of the information, but added that seekers have benefited from the descriptive questions by having to reconsider how strongly they want to farm and how they plan on achieving their goals. Also, some extra information has helped dispel some myths about beginning farmers. For example, LLV asks the seekers for their birth date, which has debunked the assumption that aspiring farmers are all young and inexperienced.

Most applications also ask the seekers about their previous agricultural experiences. LLV initially had some non-farming seekers enrolling in the matching service, hoping to skirt the real estate industry. Now, they require seekers to have at least three years farming experience and the intent to have a commercial enterprise. NYFL does not ask for previous farming experience, as resume padding is too easy and common. Still, Steve Richards said the application is a good way to filter some “shady” seekers, who might carry a hefty load of debt or just gotten out of jail.

At the end of most applications is a liability statement, which seekers and landowners sign, allowing the release of their information. Liability statements often clarify that there is no guarantee a match will occur. For example, CaFL’s liability statement reads as follows:

I give California FarmLink permission to release my name, address, phone number, and any information provided in this questionnaire to persons who in its judgment may match my farming interests or be interested in the activities of California FarmLink. I understand that in no way does California FarmLink guarantee that I will be successfully matched with a retiring farmer.¹³

Other closing statements include a sentence that relinquishes the land link program from liability of any loss, damage, or injury that may occur as a result of inquiries or interviews related to the match.

Steve Richards offers some words of wisdom regarding the application process. “Once seekers and landowners find one another, they are anxious to get going. Make everyone complete the application, no matter how rushed or urgent someone seems.” This advice refers to culling out any unqualified seekers, but Richards was also suggesting that hastiness can lead to inadequate communication between the two parties and poor business arrangements.

Facilitating Matches

Once the applications are complete, some land links still filter out farm seekers who have minimal on-farm experience or undeveloped plans on running an agricultural business. As Richards cautions, 90% of the seekers have no money, and 50-75% have no

¹³ California FarmLink. 2006. *Aspiring Farmer/Rancher Questionnaire*. http://www.californiafarmlink.org/#aspiring_farmers.

experience. Inexperienced seekers can also demand a lot of time from land link staff. All of the land link professionals warned that a seeker's lack of on-farm experience can be a significant barrier to successful matches—not only in running a viable agricultural business but also in making a positive impression on landowners. It is not uncommon for a seeker to leave a bad impression, simply because they are unprepared. John Guardino explains, “California FarmLink—especially in the North Coast region—has many back-to-landers with a more romantic view of agriculture and not much on-farm experience.” They actively refer these inexperienced farm seekers to apprenticeships or on-farm jobs, before pursuing their own business dreams. David Kimmel does not actively filter these aspiring farmers from the matching service, but encourages them to take a short course through the New England Small Farm Institute, called *Exploring the Small Farm Dream*. The course and workbook help beginning farmers identify and assess their values, goals, and general ideas for prospective farm businesses, and ultimately decide if they truly want to start farming. NYFL lets the farmers weed out unqualified seekers, as Richards does not want to interfere with the possibilities.

Marion Bowlan described several risks landowners perceive regarding inexperienced aspiring farmers, including: not paying rent on time, a lack of income from crop sharing, and an inability to take care of land—such as preventing erosion, managing weeds and maintaining the productive capacity of the soil. Because of these perceived risks, many landowners will not consider working with unseasoned seekers.

In the next phases of facilitating matches, each program takes a different path. Some land links simply distribute the information and let seekers and landowners find one another and make their own business arrangements. The programs that are underfunded or -staffed tend to take this approach. For example, NJFL depends entirely on the internet, because it has no funding, other than Kimmel's salary. Mary Embleton mails a list of all of the farming opportunities to the seekers in the WaFL database, because there are only 45 landowners enrolled in the program. Then, she emails her seeker listserv with any new farming opportunities. The landowners enrolled in WaFL only receive a list of seekers upon request. Contact information is included in both the NJFL and WaFL lists, so that participants can get in touch with one another directly. Often, this as far as the New Jersey and Washington programs take the match-making process, which reduces

the amount of staff time required to facilitate links. Embleton, however, will follow up with participants to see if they need any further assistance. Also, Washington FarmLink will host seeker/landowner meetings when they have grant money available to do so. See Box 1.1¹⁴ for a summary of this approach.

Box 1.1: Hands Off Approach

Process & activities:

- Collects information from seekers and landowners via applications.
- Posts a complete list of opportunities with contact information on the internet or mails to participants.
- Staff is available to provide some technical assistance or refer clients to other resources.

Requirements:

- At least one quarter-time employee.
- Operating annual budget of approximately \$20,000.

Other programs distribute a summarized list of seekers and owners, using a code for each participant to protect their identities. Then, clients can request further information on a particular seeker or owner by referring to particular codes. When a participant requests more information on another client from LLV, Heleba sends out information to both the seeker and landowner simultaneously, so that “each party gets information on each other, and a cold call does not happen.” LLV and PaFL also use hard copy mailings, since many farm owners do not use the internet. Both Heleba and Bowlan said that some farmers feel awkward about having their information posted on the world wide web—even the farm summary—and would be reticent to give any personal information if it were posted on the internet. In Bowlan’s words: “Farmers are tight-mouthed. You need to find ways to keep their information confidential, while also getting information out to seekers. It is hard enough to get landowners in the database.” On the other hand, both Bowlan and Heleba said the internet is an efficient way to reach seekers.

Land Link Vermont will also do monthly mailings and annual renewals to refresh the database with up-to-date information. To do so, Heleba requests feedback from

¹⁴ Boxes 1.1, 1.2, and 1.3 generalize a few approaches to facilitating matches, not represent everything a land link program does or the finer details of their matching services.

seekers and owners, not only for their current status but also to hear how the LLV is serving them. She prefers an “arm’s length” approach to match making, where the land link introduces concepts, information, and a referral network of various resources and services and offers technical assistance upon request. By “arm’s length,” Heleba is not suggesting they are disengaged from the process. Rather, LLV does not want to get in the middle of the seekers’ and landowners’ relationships. As Heleba reflected, “who are we representing, both parties or one? Landowners and seekers do not always have the same interests.” Thus, LLV steers participants to the appropriate resources to navigate the details of their arrangements, calling upon the land link for help when needed. The other reason they do less “hand-holding” is financial constraints; the more involved a program is with their clients, the more expensive it is. LLV’s match-making framework allows Heleba to cover all of the matching service’s tasks in eight hours per week, on average. Box 1.2 summarizes the arm’s length approach.

Box 1.2: Arm’s Length Approach

Process & activities:

- Collects information from seekers and landowners via applications.
- Mails participants a codified list of opportunities.
- Mails more information on particular opportunities upon a client’s request.
- Publishes resources on lease agreements and alternative tenureship.
- Establishes a referral network that farmers can utilize.

Requirements:

- At least one half-time employee.
- Operating annual budget of approximately \$40,000.

A couple of land link programs are a little more involved in finding potential matches based on the participants’ applications. PaFL and CaFL, for instance, examine seeker and owner applications and search the database to determine potential matches, finding parallel needs and interests. According to Bowlan, the farm or ranch location is the number one factor in deciding potential matches. Seekers generally only want to farm in a specific area, but often open their minds to other places later in the process. Both programs will then mail out a codified list¹⁵ to both seekers and owners at the same

¹⁵ *Codified list* refers to a list of landowners or seekers with a description of what they have to offer a match but without any personal information attached. Instead, there is a code, which a client can use to request further information on a particular opportunity. See page 48 for a tangible example.

time. This is often as far as PaFL takes it, but often refers clients to other resources to establish a thoughtful business arrangement.

One of the factors that distinguishes many land linking approaches is whether or not they are field-oriented. That is, do land link professionals visit with landowners and seekers during the match-making process? Initially, NYFL takes a similar approach to LLV, mailing participants a codified list and letting them define their own possibilities. But Richards also spends much of his time visiting the farms in the matching service to see if the descriptions in the applications are accurate, walking the property and speaking with the landowners to see what they really want to do. Steve Schwartz agreed that site-visits are essential: “Landowners are often poor communicators and exaggerate the value of their land and facilities.”

While Bowlan concurred that “nothing can replace actually seeing a place and what they have to offer, so you can help a seeker,” finding time to visit farms is challenging. PaFL staff has not been able to visit farms as much recently, and Bowlan sees the number of matches decreasing because of it. LLV staff visits some of the farms—mostly the dairy farms—enrolled in the program, but not all. Heleba observed that “Maine FarmLink is very field-oriented and they have better returns than we do.”

Some land links also meet with farm/ranch seekers at their headquarters. Steve Richards will meet with seekers to make sure they have a realistic vision of farming. Richards will also give seekers some tips on what to expect from landowners and how to make a positive impression on them. John Guardino added, “Usually, it’s the landowner that chooses the farm seeker, although the seeker has to make the decision as well.”

Of the six programs I reviewed, California FarmLink takes the most hands-on, field-oriented approach to facilitating matches, outlined in Box 1.3 below. After the application, the next step for CaFL is a site visit to get an impression of the landowner, the property, and what they want and are willing to do. California is a big state, and CaFL has set up offices in three regions—North Coast, Central Coast, and Central Valley—to reduce driving time. Then, staff interview farm seekers and give the seeker a better sense of what each farm has to offer. Behind the scenes, CaFL combs the database for potential matches. Finally, CaFL schedules on-farm meetings with the landowner and three seekers. The seekers arrive one at a time so they each get some one-on-one time

with the landowner; but more than one seeker may walk the property with the landowner. Guardino admits that it can be a little awkward to have two seekers and a landowner on the farm or ranch at the same time, but it is much more efficient in terms of time and energy for CaFL’s staff. Plus, the seekers far outnumber the landowners in the database, and they like to give landowners at least three options. Typically, no one makes a final decision during these farm meetings, and it can take up to six months before the two parties reach a commitment.

Box 1.3: High Involvement Approach

Process & activities:

- Collect information from seekers and landowners via applications.
- Meet with seekers and landowners in-person.
- Search the database for potential matches and mails list of possibilities to participants.
- Call participants to discuss possibilities.
- Facilitate dialogue and business agreements with the two parties and other professionals.

Requirements:

- 1.5-3 full-time employees.
- Field and travel time.
- Operating annual budget of approximately \$100,000-200,000.

Beyond the many tangible strategies for facilitating matches, several land link professionals offered philosophical insights to approach linking. Steve Richards reflects that there always has to be one party driving the process—usually the land link. That does not mean NYFL steers the process towards the program’s agenda, but rather according to what the participants said they wanted to do. To “keep the ball rolling,” he will continue calling clients to inquire about potential matches, because participants often skip over some important steps in creating a seamless partnership arrangement, such as writing their agreement on paper and bringing a lawyer into the process. NYFL also meets on the farm with the landowner, seeker and a lawyer to review the contract. Then, Richards will make a follow-up visit to finalize the arrangement with the two parties.

A few land link professionals reflected that they are match-makers on different levels. Land links match farm/ranch seekers and landowners as well as link participants to other professionals and resources. John Guardino, for example, says, “You have to be

a jack-of-all-trades, master of none, but a master of listening and knowing a combination of professionals to bring into the process.” The most frequently mentioned resource to bring into the process is an approachable, agriculturally savvy lawyer to help craft a solid business arrangement. According to Richards, “Finding a good attorney is part of keeping the ball rolling.”

Business Arrangements

There are several options for landowners and farm/ranch seekers in creating business agreements. The most common are purchase, cash rent—including both short- and long-term leases—and crop share. Some land link participants have also opted to enter in other kinds of partnership arrangements, such as working together in farm/ranch management and labor.

Some land link programs encourage the farm/ranch seeker to lease or share crop land, rather than purchase it. A land link cannot control the market value of land, but this is one way a program can help seekers overcome the barrier of high land values. Deb Heleba, for example, promotes alternative tenure rather than buying as a first step, because “if possible you want to invest your start-up dollars into the farm business rather than real estate.” Ideally, these tenureship alternatives help producers establish their businesses and build equity. Plus, the less experienced farm/ranch seekers can become seasoned without falling too far into debt.

Land link programs take different strategies and degrees of involvement to facilitate the business arrangements between landowners and farm/ranch seekers. Many have publications—including how-to guides and workbooks—to inform landowners and seekers about their options and teach them how to work through the details of various business agreements. Heleba, for example, wrote *A Lease Agreements Guide for Landowners and Farmers*, which outlines a few approaches to lease agreements and the steps participants can take to write one.

Heleba and Kimmel also said one challenge is that farm seekers are often looking for a long-term arrangement, while landowners tend to favor short-term leases, because they want to have an easy exit if it is not working for them. On the other hand, a short-

term commitment decreases the incentive for the tenant farmers and ranchers to improve soil fertility, prevent erosion and invest in a property's infrastructure—like fencing—without a long-term commitment from the landowner.

Communication

Several land link professionals spoke to the importance of communication in creating solid business arrangements between farm/ranch seekers and landowners. Many lease agreements are on a handshake basis, lacking a detailed plan or anything written down, which can lead to misunderstandings down the road. Putting an arrangement on paper is an opportunity to discuss and document the expectations each party has of one another. For example, it can be as simple as a farmer writing the landowner a letter about what the agricultural operation involves and when certain activities will take place. Access can be a sticky issue, and any type of activity that might occur when the landowner is home can be tricky—especially on weekends and early mornings. The farmer, for instance, might need to cut hay on the only sunny day of the week, which may also happen to fall on a weekend that a second homeowner is relaxing on the estate. The aesthetic appearance of the farm or ranch also tends to be more important to non-farming landowners than producers. This can also be discussed in the business arrangement. Richards thinks if everyone is open and honest about what they want out of the deal, it usually works. He added, “That’s probably why it works a little better between non-family members, because families don’t tend to deal with it like a business transaction.” Plus, if the match falls apart but is predicated on a tight business agreement, everyone has a clear understanding of what happens under the circumstances.

John Guardino emphasized that communication also needs to happen between the land link organization and the participants. Non-farming landowners, for example, might need some hand-holding through the process of creating partnerships, especially in keeping dialogue going. Land link programs can “help people go into a partnership with eyes-wide-open,” Guardino said, adding, “There are all these emotions and issues with money. Keep the dialogue going when things get sticky.” Heleba suggested that land links can also help non-farming landowners better understand what producers are up against.

Databases

The types of databases existing land link programs use range from paper files to computer software. CaFL even uses an online service so their database can be accessed from anywhere with an internet connection. NYFL is the only program that does not bother with a computer database. They have about 200 participants and just use paper files. When one requests more information on another client, referring to the code given to a particular participant, NYFL makes copies of the resume and application, most of which are hand written, and mails them off. Steve Richards thinks paper files are easier, but if the database contained more seeker and landowners, it might be more efficient to scan the applications and resumes onto the computer and print them each time a request is made.

Farm On in Iowa uses the Filemaker Pro software, because the templates look like the form they send out to seekers and owners. Plus, they can attach notes on a separate page to keep up-to-date tabs on any conversations had with a client. John Baker of Iowa has offered to share any templates for the database and application forms.

Microsoft Access is the most commonly used database software, and the land link professionals give it mixed reviews. LLV, PaFL and WaFL all use Microsoft Access. The directors of these land links say it works well for searching the database categorically—such as by location and acreage—to find potential matches. Access has a form view, which appears like the application form, and a categorized data view. It is also easy to export information to Excel and Word, and save things in html formatting for web postings. And like FileMaker Pro, Access has a notes page to attach conversations to a participant's file, so that land link staff can keep on-going and up-to-date records of each client.

The main critique of Microsoft Access is that it is too complicated and not user friendly. Marion Bowlan says this can be a problem when training new staff and suggests finding a simple program for user-friendliness. She also said that they refer to the original applications all the time, and do not rely entirely on the database for information. Bowlan conceded that she is not a good person to ask about recommending a database, because PaFL relies more on phone conversations and the original applications than on the various categories for data. Mary Embleton agreed that Access

is confusing and thinks she would benefit from taking a class about how to fully utilize its potential. Deb Heleba, on the other hand, thinks Access is a user-friendly program and is pleased with its performance. LLV worked with a designer to set up the database.

California FarmLink has the most elaborate database system, Salesforce, an online customer relationship management company, which is free for non-profits. They paid a technical designer \$500 to customize their database templates. Schwartz wanted a relational database to allow them to search each category—such as crops, region or acreage—in finding potential matches. Salesforce keeps their information password-protected and helps them document each conversation with their clients. Every time a conversation happens with a participant, the information and nature of the conversation is recorded in the database. Then, the next time staff speaks with someone, they can look up the track record of what has been covered. This helps save time later by only calling relevant folks when finding potential matches. Salesforce easily crunches numbers in their fundraising efforts to report how many people were served by their workshops, technical assistance, farm/ranch visits, etc. It seems Salesforce is especially useful to CaFL, as they have three offices and multiple staff members visiting farms and ranches. The online service might be less essential to those programs based out of a single office. Should western Montana's land link use Salesforce, Schwartz has offered to share their templates, which can be further customized.

Administration & Staff

Existing land link programs are organized under three types of agencies: non-profits, extension, and state governments. CaFL and PaFL are their own non-profit organizations, and WaFL is one of four programs that the non-profit, Cascade Harvest Coalition, administers. Two of the non-profits, WaFL and PaFL, were incubated under county and state governments, respectively, in their initial years. Marion Bowlan recommends finding an agency to house a new land link program before becoming its own entity. NYFL and Farm On operate under state extension agencies. New Jersey's Department of Agriculture houses the Farm Link Program. The University of Vermont administers LLV. Steve Schwartz and Marion Bowlan both appreciate the autonomy that

non-profit status allows. David Kimmel said one of the bonuses of being under a state government is funding for staff—though that is all the funding NJFL receives. One drawback he faces as a state program is governmental red tape, which bans out of state travel and did not grant him the autonomy to update the webpage until recently. The other downside of working under the state Kimmel mentioned was the risk of having the budget cut. Other land link professionals did not speak much to the benefits and drawbacks of their organizational structure.

Staff

Staff is clearly the most expensive and important component of the existing land link programs. According to Kimmel, a lack of staff, who are familiar with agriculture, is what cripples NJFL. Kimmel is the sole staff member of NJFL, and his main priorities are on other programs under New Jersey's Farmland Preservation Program. Embleton is also spread thin with other programs, as the only employee of Cascade Harvest Coalition. It is no surprise that these under-staffed programs facilitate matches as efficiently as possible by publicizing the information and resources, hoping their participants will utilize them well.

Heleba is LLV's only full-time staff member, and she spends about one-fifth of her time on the matching service. LLV receives clerical and book-keeping assistance from one office assistant, who also works with the six other programs housed under the Center for Sustainable Agriculture at the University of Vermont. Then, they have two part-time outreach assistants, who are retired dairy farmers and work with some of the landowners and seekers interested in dairy. Because of funding constraints, LLV's matching service takes about eight staff hours per week. So, a single work day per week covers their linking work, "but much more could be done," Heleba said.

Steve Richards is full-time with NYFL and spends over half of his time driving to visit with farms, and one or two days a week in the office. The work load is less of a burden, because he has one half-time employee to manage the office. Still, Richards would like to expand his staff to help visit farms, meet with seekers, and bring seekers to the farm. He thinks this might increase the annual matching rate, which he estimates at 1-5% of the database.

Richards added another challenge is that a lack of funding increases staff turnover, which compromises the land link's ability to establish meaningful relationships with participants. "If there is a lot of staff turnover in a program, that can kill it, because farmers will see a new face every year. That's one of the challenges with a farm link, because until you get stable funding, staff turnover is high."

California FarmLink seems to have the most staff and organizational involvement with landowners and farm/ranch seekers. CaFL started in 1998 and started paying one staff member, Steve Schwartz, a year later. Schwartz was the only employee until 2001, when they added a half-time administrator. Now, CaFL also employs a full-time VISTA volunteer, and three half-time outreach assistants—one per region. The outreach assistants spend roughly 80% of their time on matching, which includes outreach and public presentations, and 20% of their time conducting workshops. Schwartz hopes to expand his staff to include a program assistant.

Funding & Fundraising

Annual Budgets

The existing land link programs' annual budgets range from almost nothing to \$240,000. California FarmLink has the highest annual budget for its matching service. At the low end of the spectrum are the New Jersey and Washington programs. NJFL is essentially an unfunded program, but David Kimmel's salary is paid through the Department of Agriculture, and Kimmel tries to access grants and pull funds from the Farmland Protection Program for specific land link tasks. The non-existent annual budget affects program promotion, publicizing, travel and amount of staff working on the matching service. WaFL has an annual budget of \$15,000, and Embleton said a lack of funding is the biggest barrier to running the matching service.

Land Link Vermont's annual budget in 2005 was \$78,000, with roughly 15% going towards the matching service. Heleba said the biggest expense is staff, which makes field time expensive. She also suggested that there will be more costs to set up a matching service—including the database, website and promotion. But she thought

\$50,000 could cover the first year, depending on the number of staff and time spent in the field.

Pennsylvania Farm Link's 2006 budget is around \$100,000, the majority of which goes toward staff (\$45,000), office supplies (\$25,000) and printing materials. Other items in their annual budget are travel (\$5,500), postage (\$4,000), communication bills (\$3,250), workshop speakers (\$2,500), rent, insurance and accounting. Bowlan suggested that starting a matching service will require an annual budget of \$10,000 to \$15,000 on top of one full-time salary. The \$10,000-15,000 would fund communications, equipment, office space, and travel. The big variable in that equation is the travel. How many miles the land link plans on covering to visit landowners and give public presentations will greatly influence the first annual budget. The equipment we will need is a computer, fax, printer, copier, and phone. Some of these can be rented, and we might be able to gather in-kind donations.

New York FarmLink also has an annual budget of \$100,000, which covers 1.5 staff, program materials and travel. Richards thought these funds were a little tight, and a land link would need closer to \$200,000.

Fundraising

Some land link programs charge an enrollment fee to farm/ranch seekers, due with the application. NYFL, for example, charges \$40 for the seekers and is free for the landowners, because there are so few of them. Richards says this enrollment fee helps filter out the seekers who are not committed to farming: "Forty dollars might be a barrier for some seekers, but if they're not serious enough to pony up 40 bucks, then they're probably not serious enough to take on \$500,000 of debt to go into farming." LLV has a one-time enrollment fee of \$20 for seekers. Heleba does not think it deters people. CaFL charges both seekers and landowners \$20. WaFL and NJFL do not charge an enrollment fee, but Embleton is considering a \$35 fee to both seekers and owners, depending on the results from a survey they will be conducting in the near future.

Grant money provides most of the funding to many land link programs. LLV, WaFL, and PaFL are primarily funded by grants. Embleton warned that being dependent on grant money is unsustainable, and Bowlan added that it is difficult to continue

receiving grants after a few years. Steve Schwartz has gotten a variety of grants to run CaFL, but advises against spending much time on small grants (\$1,000), after a program has been running for a few years, as it's a questionable investment of time. There are a few main sources of grant money that the land link professionals mentioned, including: Sustainable Agriculture Research and Education (SARE), Research Management Education (RME), and the USDA's Risk Management Agency (RMA). These agencies seem to fund educational programs—such as the workshops land links offer during the winter—not the matching service itself. Most programs also rely on more local, community-based grants. Local foundations helped launch LLV and still fund some of their annual budget. CaFL has found local foundations tend to support linking, advocacy work, and training programs.

A couple programs are government funded. While the state of New Jersey only covers David Kimmel's salary, Farm On has enjoyed much political support from the Iowa state legislature. CaFL has been able to access government funding for training, technical assistance, and the clearinghouse of information and resources.

Schwartz was particularly excited about raising money from banks, which typically give \$250 to \$5,000 per event. For community reinvestment through a 501 (c3), they will often donate \$10-50k. In general, he says banks like the training and equity-building programs, as well as technical assistance.

When approaching funders, Richards suggested calculating the economic value to the community those matches create. "If each of the 12 matches we made last year—mostly dairies—added \$500,000 to \$1 million dollars in sales, that's a lot more than your budget. So, you can say, 'On your investment of \$100,000 in my organization, you got a \$12 million return in the agriculture industry.'" Richards will also include the number of jobs matches created. Publicly funded programs can also encourage matched participants to talk to legislators about how the land link has impacted their operations.

Deb Heleba said the program's overall goal is summed up by the American Farmland Trust bumper-sticker on her office door: "It isn't farmland without farmers," which she tries to convey when fundraising. She and Bowlan explained that many people want to protect agricultural land, but have not quite grasped that we also need to consider who will keep that land in production. So, it takes some re-framing of the issue to get

through to funders, by asking them: who will be the next generation of farmers and ranchers?

Partnerships

As Steve Schwartz explained, farm transfer issues cut across all sectors of the agricultural industry, and land-linking is something diverse organizations can rally around. Thus, he advises land link programs to keep their partnership options open and to not exclude organizations that may have differing views about farming and ranching. Much of the land links' accomplishments have been achieved by working with other organizations and individuals. According to Schwartz, working with partners can help build credibility, funds, publicity, and a network of resources. Bowlan suggested building a resource team composed of Extension, Department of Agriculture, Farm Credit Union, Farm Service Agency, farmland preservation programs, National Resource Conservation Service, farm-knowledgeable attorneys, farm member groups, Farm Bureau, Farmers' Union, and producers.

Usually, partnerships come into play with the various services and resources used to help facilitate farm and ranch transfers—such as workshops, publications, and technical assistance. The matching service, however, tends to be exclusively a land link program's endeavor. The main partnership used in match-making is with agriculturally savvy lawyers, who often will offer a special rate for producers. Extension has also been helpful in facilitating successful matches for several programs. Richards said they are a good party to invite into the process when closing the deal, as Extension can offer financial and legal assistance. Extension usually has a staff member who is good at business plans and financial projections. He added that “if you make referrals to extension, they will make referrals to you, and you'll get a lot of referrals from extension.”

The Vermont Land Trust (VLT) has played a limited but increasingly important role with LLV's matching service. Heleba spoke of a program the land trust recently launched, the Farmland Access Program (FAP), for which they raised money to purchase farms. VLT usually sticks strictly to conservation easements, but the FAP's funds have

enabled them to buy the farm at market value. Then, VLT will put an easement on the land and sell it to a farm seeker for its agricultural value, still well below the market value, even stripped of its development rights. The land trust then has a call for proposals and works with Land Link Vermont to identify qualified farm seekers. For example, VLT recently purchased one farm for about \$400,000. After interviewing a some of the seekers enrolled in LLV and others, VLT sold the farm for \$240,000 to one aspiring producer, who showed the most promise in establishing a viable farming operation.

Realtors are the last type of partnership that was mentioned specifically in match-making. Mary Embleton said WaFL has been working with one realtor, who has helped beginning farmers access the land.

Several land link professionals suggested a few strategies for working with partners. Schwartz warned: “Be wary of partners telling you what to do and micro-managing your organization.” He added that it is important for the land link to drive the process. The organization can do this by keeping their partners’ tasks and commitments simple and clear. Richards also cautioned that when introducing professionals into the process, a land link has to ensure that “their approach is correct and they ask the right questions in a way that feels comfortable with the farmers. Approach is half of it, and knowledge is the other half.” He offered the example of a particular attorney who was “brilliant, but there’s no way a farm family would feel comfortable with him.” Fortunately, NYFL works with another lawyer who is very personable.

Promotion & Outreach

Because most land link programs have to stretch tight budgets, they tend to rely on free sources of publicity—including press coverage, partnerships, and in-person conversations. The internet is a great way to attract farm/ranch seekers to the matching service. Heleba estimated that 90% of the seekers will learn about LLV via their website. On the flip side, she added, “farm owners are a little more hesitant than seekers and need one-on-one contact.” Richards agreed and does not rely on the website to reach out to farmers, which is one of the reasons he spends most of his time driving around the state to visit with the farmers enrolled in his programs.

Working with partner organizations is another strategy to promote the matching service. CaFL, for example, will run workshops with the Farm Bureau as a co-sponsor. In Vermont, the land trust is LLV's number one referral, and Extension sends many clients to NYFL.

Richards suggested, "ride the initial wave of publicity" when starting a matching service. He elaborated: "In the first couple years, everyone thinks this matching thing is a great idea. You'll get invited everywhere and tons of press. Hit the newspapers and ag journals." Heleba said placing ads in the agricultural journals and farming magazines is expensive, but it has been a good investment during the off-season, when many seekers begin looking for land.

Press, on the other hand, is free. Bowland and Schwartz each write newspaper columns. Schwartz said each article brings in roughly two phone calls, which is not much but still worthwhile. Each match has an interesting story behind it, and getting it in the paper is a good way to spread the word out about the land link. Bowlan also likes to write about success stories, because the news is mostly about farms failing, and when people start thinking the end of an area's agriculture is inevitable, it can become a self-fulfilling prophecy.

Measuring the Success of Land Links

Almost all land link professionals stressed that a program's overall success cannot be based on the number of matches you facilitate—especially when fundraising—because matches do not happen very often. Land Link Vermont, for instance, has only finalized one match in the last year—mostly because of the miss-match of acres desired versus acres offered. But in the past year, LLV has had 500 requests of information. As Heleba explains, "the dating is happening;" the matching has just been a little slow recently. Other programs have seen the "dating" lead to more matches. NYFL averages 10-12 matches per year. Since 2002, WaFL has had 800 participants and 18 links, covering 300 acres. This ratio of participants to matches seems comparable to Steve Richards' number theory: "How many matches you get is almost out of your control. It's mostly a numbers game: 1-5% of the database will match up. So, the more people you have in your

database, the more matches will be made.” Farm On’s database contains 905 seekers and 230 landowners. Since its inception in 1990, 104 matches have been made, but only 5 last year. Because the number of farm/ranch seekers tends to heavily outweigh the number of landowners in all land link databases, this matching rate is also dependent on the number of farm/ranch owners.

Bowlan used to talk about the number of matches to funders, but now she sells the actions farmers take after various services—like technical assistance or workshops. This illustrates the other reason the number of matches made each year cannot summarize the overall success of land links: most are running a variety of other programs beyond the matching service. Because it is a little unclear about how to gauge the efficacy of a land link program, it would be worthwhile to look further into this area for sake of fundraising as well as improving a program, year after year.

Conclusion

Beyond describing their own programs, land link professionals have provided valuable suggestions and insights regarding starting a matching service. From the application process, the collective message was to keep the questions simple but thorough; to rely on both the internet and mailings, as seekers may frequently use computers but many landowners do not; and to make sure every client completes the application, even if they seem rushed.

The land link professionals reflected on a variety of match-making approaches and the roles they play as facilitators. No single approach is right or wrong, but a few pieces of advice can be extracted from their comments. First, inexperienced beginning farmers need to be filtered from the larger pool of seekers. Some programs let the landowners weed out the unqualified seekers, but it is also an opportunity to steer those seekers towards on-farm/ranch jobs and apprenticeships. Second, visiting farms and ranches and meeting in-person with clients is time well spent that pays off in facilitating potential matches. Some programs do not have the staff or funding to travel around their regions to do this, but all land link professionals acknowledged that it is a great benefit to walk each property and discuss what goals, interests and concerns each participant carries

into a potential match. And a few directors think it is critical to work directly with both parties to facilitate thoughtful business agreements. Other suggestions regarding business agreements were to encourage alternative tenureship arrangements—such as cash rent, lease to own, and crop sharing—as well as open communication. Non-farming landowners, retiring producers, inexperienced seekers and seasoned producers will all require different methods of facilitating communication, and a land link can play a role in educating each about the other parties. Finally, a handful of specialists—especially a friendly, agriculturally savvy lawyer—can be useful resources to bring into the process to help participants establish solid business arrangements.

In all six land link programs, partnerships with other organizations, agencies and individuals have been significant resources to creating effective matches, as well as promoting the matching service. Many of these partnerships can be especially helpful in organizing workshops and other services. Multiple methods of outreach were also suggested, including press coverage and advertisements in agricultural periodicals.

While land links do not require incredible sums of money, funding is what keeps these programs afloat and often dictates how involved staff can be with participants. To justify their budgets, most land link professionals emphasized that the number of matches will not be enough—especially in the first year. Rather, the actions clients take as a result of land link services—such as technical assistance or education—are what inspire funders to continue their support of the program. Three land link directors thought \$50,000 would suffice to implement and administer a matching service in the first year. Thereafter, more funding might be required, depending on the match-making process and how field-oriented the program is.

Several land link professionals said the key is getting landowners enrolled in the program. Marion Bowlan elaborated that it often boils down to the attitudes farm/ranch owners carry towards the future of agriculture and aspiring farmers and ranchers, and she suggested that we “focus on folks who already have a positive attitude towards farmers.” But she also said the land link can tap into a retiring farmer’s underlying desire to see the land remain in production:

Whether a matching service will be successful often comes down to a landowner’s attitude toward beginning farmer issues, and if they’re willing to help someone they don’t know. Will they consider anything other than

a cash rent or purchase? Do they want to see the next generation succeed? One thing you can ask retiring producers is: “how do you envision the future of this farm? Is money the most important driver in the deal, or do you want to see the farm continue?” And most want to see it stay in farming. So, you can help them get away from the mentality of getting every dollar possible out of the land, because they know what it’s like to farm. They know they did not pay those kinds of prices for it, and they love the land.

Landowner attitudes tend to vary from problematic and inflexible to committed and altruistic. Heleba thinks that all of the landowners are committed to agriculture, or they would not enroll in the program. Some, however, are more open than others to working with a variety of seekers and hosting a range of agricultural operations. Others have a more specific idea of the type of activity they would welcome on their land.

Finally, a few land link directors suggested that facilitating matches takes time. “Matches are not made overnight,” Bowlan said, “and if they do happen quickly, maybe something is wrong. So, a program has to be in it for the long haul, which is why you need to document everything.” John Baker put this in slightly different terms:

Don’t look to do a whole lot of matches in the first year. This is like winning a guerilla war. You know how you win a guerilla war? Don’t lose it. Just be around long enough where you become part of the fabric of farm and ranch transfers.

Not only do matches take time but so does setting up a land link program. “Start small and expand as you go,” Bowlan advised. She also recommended starting a land link by simultaneously working on the clearinghouse of information and resources as well as the matching service. Indeed, this is how many land link programs were launched, beginning with a matching service and, then, adding resources that would also assist aspiring and retiring producers in transferring farms and ranches. As Richards suggested, “a matching service is as good a place to start as any.”

CHAPTER 2: LANDOWNERS' PERSPECTIVES ABOUT A MATCHING SERVICE, RESULTS FROM AN INFORMAL PHONE SURVEY

Introduction

Interviewing land link professionals provides the bulk of the research and insights for designing and implementing a matching service in western Montana. The ultimate success of a land link matching service, however, will depend on how well it addresses the concerns of landowners in the region and encourages their participation. This chapter lays out some of their thoughts about a matching service, based on an informal phone survey with some of the region's producers who have been farming or ranching in western Montana for at least twenty years. A list of potential interviewees was generated by consulting with agricultural experts and others who work with landowners here. Twenty-four phone surveys were completed in October 2006. None of the potential interviewees, who I was able to reach, refused to participate. The survey was a starting point to having a conversation with them, making sure to touch on their initial reactions to the idea of a matching service, any concerns they might anticipate about participating in the program, what they would need to know upfront about it, and what land link staff should keep in mind about landowners when approaching them. The abbreviated survey questions are shown in Box 2.1 below. This chapter lays out the range of responses landowners gave to those questions, as well as other comments, relevant to a land link matching service.

Box 2.1: Questions that Guided the Phone Survey

1. How important is it to you that your land remain in agriculture, and why?
2. What is your initial reaction to the idea of a land link matching service?
3. Do you have any concerns about participating in a matching service?
4. Is there anything we should keep in mind when approaching landowners about the land link matching service?
5. Is there anything else we should consider, as we set up a matching service?

Results

This results section aims to present the surveyed landowners' perspectives in a straightforward fashion, without much of my own commentary or analysis. To do so, their responses are organized under the following categories:

- Significance of Keeping Land in Agriculture,
- Initial Reactions to the Idea of a Matching Service,
- Concerns Landowners Have about a Matching Service,
- What Landowners Need to Know about a Matching Service.

While many of their comments fall neatly under these categories, there were also some misperceptions about what a land link matching service actually is. Therefore, some of their responses were not on target. In these cases, I re-explained the concept of a matching service, offering a tangible example. After that, everyone seemed to understand the gist of the program. Their confused comments are not included in this chapter, however, it is valuable to note that while a matching service is simple in practice, the concept can be challenging for many to understand.

Significance of Keeping Land in Agriculture

Of the twenty-four completed, eligible surveys, fourteen landowners said it was “very important” to them that their land remains in agriculture, seven said it was “somewhat important,” and only three said “not important at all.” When asked why they felt that way, those who responded it was very or somewhat important, elaborated:¹⁶

- “I hate to see good farm ground not used.”
- “If we lose agriculture, how are we going to eat?”
- “It’s been in agriculture for five generations, and it’d be nice to see it stay that way.”
- “Too much land is being put not only into houses and under pavement, but also into public open space, where no one can do anything with it. So, what good is that?”
- “It pains me to see older producers selling land to developers. But I’m understanding, because it’s harder as I age to maintain the land and do the work.”
- “It’s important for me to keep my land in agricultural status for tax purposes. If not in ag status, I wouldn’t be able to afford the land.”
- “If you sell it you have to pay a lot of taxes.”

¹⁶ Each bullet point is an individual’s response. Not all comments are recorded here.

- “I’ve been on this land my whole life.”

The three landowners who felt it was not important to them that their land remain in agriculture, also said:

- “I’m surrounded by city limits on three sides. I can’t make a living in ag. Selling my land is the only way to get any money out of it.”
- “I’m almost 80, and I can’t take care of it anymore.”
- “My kids are not interested in agriculture, and I think they’d rather spend the money.”

Clearly, aging and economics are two forces that seem to shape the reasons landowners said it is not important to them that their land remain in agriculture. By contrast, it was important to landowners to keep land in agriculture for different reasons, including: long-term planning for a community’s food source; a love for agriculture, the land and lifestyle; as well as economic factors.

Initial Reactions to the Idea of a Matching Service

After describing the basic concept of a land link matching service, I asked landowners for their initial reaction to the idea. Seventeen responded that it was a good idea, to different degrees of enthusiasm—ranging from “it’s a helluva idea that would be a service to us all” to “it’s a good idea, but I don’t think you’ll have much success with it.” Six had neutral and/or conflicting comments, not necessarily expressing a value judgment, and only one said it was a “bad idea.” Those who thought it was a good idea said the matching service could:

- Help them find more land to lease,
- Help them find a seeker to lease or sell land to,
- Allow landowners to generate some income off of their land,
- Keep the land in agricultural status for tax purposes,
- Manage the weeds on their land,
- Preserve agricultural land,
- Provide aging producers with the option of keeping it in agriculture when they are too old to do the work.

A couple of landowners said the matching service was a good idea for other people, but would not fit their own situation. Interestingly, both have land that is suitable for agriculture but do not see it as valuable to a seeker. One of these has 80 acres of dry land

pasture, of which he “uses every inch for sheep,” but thought the lack of irrigation would prevent another rancher from wanting to use the land. The other has 380 acres, 45 of which are arable. Many of the landowners’ comments are shown in Box 2.2.

Box 2.2: “Good idea,” in their own words:

Finding seekers and/or land

- “It would help me find someone who could do the work, and I wouldn’t have to go looking for them.”
- “Some of the land I’ve farmed has been share-cropped, but now much is fallow. There’s a lot of good land laying fallow, and many are seeking fertile soil and pasture.”
- “Many times when I’m looking for pasture, there’s no resource to find what the hell is out there. It’s all done by word-of-mouth, or you have to run down the landowner to ask about the availability of his land.”
- “I’m imagining it as a way to lease land. Having a centralized location will make it easier for people to find and accommodate one another. A linking service can help centralize operations by helping them find land in their area.”
- “Great concept, because there’s a lot of ground that can be used and managed, be it grazed or farmed, depending on the land.”
- “When I can’t live in my own house, I’d love to sell it to someone who’d put some sheep on it or something.”
- “Great idea; it’s a critical link. The majority of ag land in the U.S. is farmed by someone other than the owner. A clearinghouse for people to connect is critical: current farmers, wannabe farmers and landowners.”

Economics & land management

- “Landowners can both make money off their land and get it managed. Letting it go to weeds is not an intelligent idea for landowners.”
- “A lot of people who are looking for ag land can’t afford it. You’re looking at several hundred thousand dollars. So, if folks who own land, and those who want to farm it can work in conjunction, harmony, to share work and money loads.”
- “Really good idea. Many are getting older and are bummed out they’re letting it go to hell, not able to maintain fences or a hay field. A matching service could fit this bill. There’s a lot of folks who want to die here but can’t keep doing the work.”
- “I like it. At my age, maintaining fences on 20 acres is tough. And I’ve been approached by developers offering an incredible sum, but if I can keep it in ag status, I’d like to keep it in agriculture.”

Farm and ranchland protection

- “If you’re trying to preserve ag land, this matching service is really important.”
- “It could keep land from development, because often landowners don’t see options to keep it in agriculture, even if they want to. When they get too old to maintain the property, they need to see all options.”

The landowners that had neutral and/or conflicting views, touched on the following topics:

- Privacy is important to some landowners, and when you lease land it becomes less private;
- Plan to pass land onto the next generations within the family before considering finding another person to farm or ranch their land;
- Land is too expensive for agriculture, but something with leases might work;
- Landowners in the Grass Valley—especially those who have been here for decades—already have waiting lists of producers who want to lease their land;

The one landowner who said it was a “bad idea,” explained further: “We have a daughter and a son, and it would be up to them before we consider finding someone else to work our land.” Therefore, she was not judging whether or not the matching service would be a useful resource for western Montana’s agricultural community in general, but rather stating that it is not a resource she needs at this time. In fact, a couple of the landowners with conflicting initial reactions, still suggested the matching service could be a useful resource for western Montana—especially once the concept was explained a little further. Others with lukewarm reactions did not say it would be useless for them or other landowners. Thus, at least 75% of the landowners surveyed thought the land link could be a beneficial service to the region, and none offered discouraging words.

Concerns Landowners Have About a Matching Service

When asked about what concerns they would have about participating in a land link matching service, landowners covered a wide variety of topics, including: the land link program and process, looking for land, working with seekers and other landowners, communication and contracts, effects on neighbors, and liability.

About the land link program or process. Very few landowners expressed concern with the way the land link operates or handles information. Three were concerned the enrollment fee would be too high. One even suggested that no landowners would participate if they had to pay for the service. Another landowner thought the clients’ information should be kept confidential. Though few replied they were “concerned”

about the matching service’s organization or process, they had more to say regarding the land link when asked about what they would need to know upfront about the program.

As a seeker. Many landowners with ranching operations are constantly looking for more pasture. As land seekers, they were concerned about equipment expenses and the terms and costs of leasing. It seems farm/ranch seekers often want to have a longer-term commitment from a landowner, because they are putting a lot of sweat equity into the property. By contrast, the landowners typically want to have an agreement they can get out of in case the leasee turns out to be unreliable in paying them or stewarding their land. Box 2.3 shows some of their comments on the topic.

Box 2.3: Concerns as a seeker, in their own words:

Term of commitment

- “As a producer—not a landowner—the biggest issue is long-range availability. If it’s short-term, that doesn’t give you motivation to put much input into the land, which is an ongoing problem. In twenty years, I’ve been on seven different parcels for pasture. Now, the land I’m on is for sale.”

Financial costs of land and/or equipment

- “A farmer would need to rent land at about \$12-15 a month per head of cattle. As a landowner on \$10,000 an acre, you’re going to want more money than a farmer can afford. Horses are different; you can make more money on horses than cattle or sheep.”
- “I don’t think the cost of the lease should be so high that no one can get into it.”
- “It’d be difficult for someone to lease, because machinery expenses are great.”

About seekers. When asked about their concerns with a land link matching service, the bulk of the landowners’ comments were about working with a farm/ranch seeker, including the following topics:

- Stewardship and how well the seeker would take care of their land,
- Reliability/trustworthiness of the seeker,
- Lack of people interested in starting an agricultural business.

Six landowners were concerned about how a seeker would take care of their land. Their comments ranged from weed control to the effects some animals have on land and infrastructure, from pesticides to taking care of a crop. Six also said it was important to be able to trust a seeker, have open communication, and depend on being paid on time. A

few landowners mentioned this payment should at least cover their taxes. Three were concerned that there simply was not anyone interested in getting into agriculture due to the hard work and low economic returns. See Box 2.4 for farm and ranch owners' quotes on their concerns about seekers.

Box 2.4: Concerns about seekers, in their own words:

Stewardship

- “Sometimes people won’t take care of their crops or weeds.”
- “Some ungulates treat ground and infrastructure harder. Cattle are much harder on fences than sheep are.”
- “I wouldn’t allow pesticides on my land.”

Reliability/trustworthiness

- “Reliable income from seekers.”
- “Someone who’s dependable, honest, and easy to communicate with.”
- “I want to be able to call the leasee and have them show up when I need them to do something.”
- “It would be very important to me to be able to trust them—like I did with friends, letting them use my equipment and land. Letting a stranger in is different. I’m very proud of my land and equipment and wouldn’t want it abused. If I trusted someone, I’d say let’s go for it.”

Lack of seekers interested in agriculture

- “You don’t have enough people interested in agriculture anymore.”
- “A beginning farmer might get tired in 5-7 years and sell out. No one wants to start an agricultural operation, because it takes credit to get started.”
- “Too many people are not willing to work this hard for such little returns. The difference with Hmongs is that they are a community, and they’re willing to work hard. Caucasians won’t.”

About landowners. Interestingly, several interviewees were concerned about other landowners, sometimes even self-reflecting on how they might be difficult to work with. Their concerns about landowners, touched on the following topics:

- Unrealistic ideas and expectations of agriculture.
- Problems with allowing certain management styles.
- Over-involvement and excessive desire to control activities on their land.

A few landowners’ comments are left unfiltered in Box 2.5.

Box 2.5: Concerns about landowners, in their own words:

- “A lot of landowners have an unrealistic idea of agriculture and expect too much money. And what you will take care of—like fixing fences?”
- “Does the landowner have a problem with predator control?”
- “I am one who likes to be in control of stuff. I like to decide when, where and how independently.”
- “Once I worked with an absentee landowner, and it was no problem. But then he moved onto the land and got more involved in my operation. Sometimes, the landowner expects more money and wants to be more involved when the income is lower than expected.”

Contracts. One interviewee worried that landowners would need shorter-term commitments, while seekers would want a contract for several years:

No one can come in for just a year. If you participate in this, how many years are you locked into it? I’d want to try it for one year to see if it works, and then do it for longer if it does. 20 years is too far down the road to think about.

Differing expectations. One landowner was concerned that “the expectations between two parties might be different—especially for someone not familiar with agriculture.”

Neighbors. A couple of landowners were thought a seeker’s agricultural activity—including cattle, machinery and odd hours—might negatively affect their neighbors.

Liability. Two landowners were worried about the liability of participating in the matching service. As one said, “If someone gets hurt on a place, you are liable.”

What Landowners Need to Know about a Matching Service

In order to develop targeted and effective materials to encourage landowner participation, the survey sought to learn about landowners’ informational needs.

Landowners said they would need to know:

- The expectations of program participants,
- The program's goals and mission statement,
- What the program can offer,
- Its enrollment fee,
- Who administers the program,
- That it is voluntary,
- The match-making process.

Most of these topics are self-explanatory, but there are several layers to what landowners wanted to know about the linking process. Some wanted to know what role the land link would play in facilitating matches, including various steps in the matching process. One wanted to be sure the terms of the contract would be set up between the two parties, not the by the land link program. Another thought it was important for the matching service to guarantee that personal information would be kept confidential.

About seekers. Most of the surveyed landowners' comments regarding what they would need to know before considering participating in a match pertained to information about farm/ranch seekers, including the following topics:

- Finances: Landowners wanted to know a variety of things about the seekers' finances, including their financial backgrounds, whether beginning producers were prepared to invest the money it takes to start farming or ranching, and what they would pay landowners to access their land.
- Reliability: Three landowners wanted to be sure the seekers were reliable people. They wanted to work with someone who was honest, a good community member, and would pay landowners on time.
- Stewardship: Four landowners wanted to know upfront how their land would be used and cared for, including how many animals would be raised on their land, how the seeker would irrigate, and how weeds would be managed. Two landowners needed to be sure that they could get out of their contract, should the seeker fail to take care of their land.
- Agricultural background: Two interviewees suggested that many beginning producers lack knowledge about and experience in agriculture and wanted to

know about their backgrounds in farming or ranching. Another wanted to know if a seeker would be growing food for personal or commercial use.

- Personality: For two landowners, a seeker's personality would be an important component of working with them. One suggested, "you'd have to meet the person and get a feeling for them."

Agreement between the landowner and seeker. Several landowners wanted to know more about the types of business agreements and contracts between seekers and landowners, which they would commit to, including:

- Expectations/obligations of one another,
- What the landowner would want out of the deal,
- Duration of the lease or contract,
- "That I'm in control of what kind of lease we choose."

Miscellaneous information landowners need to know upfront. One landowner was also curious about the location of other parcels. In his words, "As landowners, we would be interested in more pasture or hay land that would be in our area. At the price of fuel, it would have to be within 15 miles to make it doable." Another wanted to be sure she could keep her land in agricultural status for tax purposes. Lastly, some needed to know more about the liability of leasing their land to another person.

Approaching Landowners

When asked what the land link should keep in mind when approaching farm and ranch owners about the matching service, the landowners surveyed touched on a variety of topics, including:

- Giving landowners incentives to participate,
- Terms of business agreements landowners will find appealing,
- Many landowners are aging,
- Challenges when dealing with landowners,
- Be respectful, honest and keep an open mind.

Landowner incentives. As one landowner suggested, “Make sure it’s worthwhile to them. Most landowners are not independently wealthy and will need to get some income off of their land.” Another elaborated that landowners would want a lease to cover their taxes, and many depend on the land as an income source, even if retired. One landowner thought the opportunity to keep their land in agriculture could be an appealing incentive in itself.

Terms of agreement. Several people thought landowners would be reluctant to enter a long-term commitment with a seeker. As one put it, “Most landowners would want to do a short-term lease at first to see how it works.” Another said that his old age would prevent him from doing a long-term lease. Lastly, one thought it would be important for the landowner to be able to cancel the contract if the seeker was “destroying the land, which is easy to happen, be it from animals or irrigation.”

Challenges with landowners. Three farm and ranch owners suggested that working with other landowners can be tricky. One said that greed can get the better of some landowners, and “sometimes, a landowner thinks they’re giving something for nothing, when they’re really getting a service in weed control [from grazing livestock].” Another said that so many producers—especially on the larger ranches—are getting old. When the ranch is passed onto the younger generation, “they turn around and sell it,” and it ends up with a developer or as a dude ranch. Finally, one suggested, “A lot of people that have ground don’t share well. All they want is their own land and the one next to them.”

Landowner Recommendations for Starting a Matching Service

At the end of the interview, landowners were asked if there was anything else they would like us to keep in mind when establishing a land link matching service. Their suggestions are include the following categories:

- Land,
- Business arrangements,

- Promotion,
- Administration.

Land. The landowners surveyed had differing views about what types of properties would be best suited for a matching service. One landowner suggested it would work best for larger parcels, saying, “You need at least 200 contiguous acres for a self-sustaining operation.” But another thought smaller acreage held the best opportunities for a land link: “On the larger parcels, the landowner either runs their own operation or hires someone else. There might be more need for a matching service on parcels from 10-20 acres.” One landowner recommended that the matching service include both large and small parcels. Another suggestion was to locate areas with irrigation and “find landowners who’d be open to having a truck farm on their land.” Lastly, one interviewee said that out-of-state landowners might be more interested in leasing out their land than locals.

Business arrangements. Three landowners thought it was vital for the seeker and farm/ranch owner to have open communication and recommended that expectations be made explicit. For example, one landowner said, “You need to have a clear definition of minor and major maintenance—like who fixes the fence.” He referred to a situation where he was leasing pasture from another landowner. A car veered off the road and destroyed five fence posts. In his mind this fell into the category of “major maintenance,” but since it had not been discussed or defined in their business agreement, neither wanted to take responsibility for the reparation. Other landowners thought if the lessee is providing a service—such as putting up fence—it needs to be compensated in the arrangement. And another said the seeker needs to communicate with the landowner about what they want to do with the land.

Promotion. Three landowners suggested that promoting the program will be vital to garnering seeker and landowner participation. One recommended placing ads in the newspaper and on radio waves. Another agreed and suggested the Lolo Peak News and the Clark Fork Chronicle as local and free. She also advised the land link program to do public presentations in communities, and even offered to help organize one in her area.

Another landowner thought a website would be a good way to gather and distribute information, but recommended that information be kept generic and confidential.

Administration and miscellaneous recommendations. Many of the landowners interested in the matching service offered a few recommendations regarding how the program should be set up, organized, funded and administered. Some of their comments are as follows:

- “There’s a lot of good ideas that fail because they can’t get funded. Get the commitment and the resources in place before you set it up.”
- “Have a timeline, because these things don’t catch overnight.”
- “Pre-screen applicants, both seekers and landowners so that it’s an information exchange. The landowner needs to know what the qualifications are of a seeker, and the seeker needs to know what the soils are like, etc.”
- “It needs to be funded somehow so that it’s not costing either party much.”
- “Anybody that has land in ag status, you ought to know the tax code and who assumes liability.”

Conclusion

The vast majority of the landowners surveyed, 88%, feel it is important to keep their land in agriculture. This is an opportunity for a land link matching service to tap into their desire and provide them with viable options and strategies to meet this goal—especially for those who are aging and no longer able to work their land. Many of the farm and ranch owners also saw many benefits to having a matching service in western Montana, including:

- Helping aging producers and other landowners find seekers to steward their land, manage weeds, and maintain fences;
- Helping ranchers find more pasture;
- Enabling landowners and retiring producers to generate some income off of their land.

But running a matching service will not come without challenges, and many landowners provided a variety of insights as to what concerns them about participating in a land link program, how the matching service might meet their needs, and how the program can encourage their participation. The matching service can address the

landowners' concerns and needs and encourage their participation by all doing the following tasks:

- Provide them with other incentives and strategies to keep their land in agriculture—such as information about agricultural status for tax purposes;
- Have a thorough but relevant application process for both landowners and seekers, so that each party can make informed decisions about who they would want to work with;
- Facilitate on-farm or -ranch meetings so that the two parties can meet one another and further discuss plans, expectations, stewardship issues and a business agreement;
- Encourage landowners and seekers to make the details of a business agreement explicit and on paper, providing them with a guide of how to write lease and crop share arrangements.
- Be transparent with the match-making mission, process, administration and the roles and expectations of the land link program and its participants;
- Establish a website and literature to communicate the program's organization, process, and land link opportunities (a description of those seeking access to land and those looking for a producer);
- Understand and communicate liability and tax laws;
- Use codes in place of personal information on land link opportunities to maintain an initial level of confidentiality;
- Keep the service free for all landowners;
- Clarify that the matching service is entirely voluntary, and both seekers and landowners have the agency to write their own business agreements.

If the land link accomplishes those undertakings, the vast majority of the surveyed landowners' recommendations will be taken care of. However, it is also in the land link's interest to encourage as much participation as possible to provide a variety of opportunities to both seekers and landowners. In other words, the more people in the matching service's database, the better the chances are that successful matches will be made. Thus, the land link should try to encourage landowners with various parcel sizes and qualities and seekers with differing agricultural aspirations and skills to enroll in the program. The landowners surveyed offered several recommendations to promote the program—including, newspaper advertisements and articles, public presentations, radio advertisements, and a website.

Although landowners mentioned many challenges facing agriculture and a matching service in western Montana, at least 75% think the land link program could be a useful resource. Certainly, the program will not be suited to everyone's needs. A couple of landowners, for example, were clear about not wanting a stranger on their land. The

land link should not focus on those it cannot serve but rather on the many who want to keep their land in agriculture and are willing to work with others, despite having less prohibitive concerns or challenges.

CHAPTER 3: RECOMMENDATIONS FOR BUILDING A LAND LINK MATCHING SERVICE IN WESTERN MONTANA

Introduction

Land link matching services have helped many areas in the U.S. keep agricultural land in production by facilitating farm/ranch transfers—assisting producers in accessing fertile soil, despite rising land values, and allowing landowners to see all of their options. The landowner survey showed sufficient interest in a regional matching service, with 88% saying that they felt it was important to keep their land in agriculture, and at least 75% suggesting a land link could be a useful resource. Therefore, it seems safe to conclude that a matching service should be implemented in western Montana.

In general, matching services are simple programs and do not require an exorbitant amount of money to launch or administer year to year. There are many layers and subtleties, however, which need to be considered in designing and implementing a matching service. This chapter lays out recommendations and options for implementing a land link in Missoula and adjacent counties, based on the land link professionals' and farm/ranch owners' perspectives, which the Community Food and Agriculture Coalition can consider for the next phases of starting a program.

Recommendations

Recommendation #1: Create a mission statement and long-term vision for the program.

The mission statement and long-term vision for the land link will help communicate the goals and strategies of the program to participants and partners. More importantly, they will keep land link staff focused on the central purpose and tasks.

Recommendation # 2: Choose a general framework to approach facilitating matches.

As discussed in the first chapter, there are a few basic frameworks a land link can work under to facilitate matches. In the first month, establishing the infrastructure—such as the database, website, and applications—will be similar, regardless of the match-

making process. However, it is important to know which direction the land link is headed in order to make decisions in the short-term that will make those goals possible. Also, the match-making framework will greatly affect the annual operating budget. The more involved a land link is, the more staff time and materials are required.

I recommend western Montana's land link use a hybrid of the high involvement and arm's length models, which is outlined in Box 3.1 and similar to New York FarmLink's approach. Once applications are complete, land link staff can visit with participants in person to hear more about their goals and needs. Then, clients can narrow down their lists of possible matches, using a summarized list of opportunities. Next, the land link can facilitate communication and business agreements between seekers and landowners and refer them to other resources. This is a general framework, and each step of the process is discussed further in some of the following recommendations.

Being field-oriented will require a fair amount of staff time. When the program reaches a high-level of participation, the land link will need at least one full-time employee, and possibly a part-time staff member as well. In the first year, however, one half-time employee might suffice.

Box 3.1: Hybrid Approach, High Involvement/Arm's Length

Process & activities:

- Collects information from seekers and landowners via applications.
- Meets with seekers and landowners in-person.
- Mails participants a codified list of opportunities.
- Mails more information on particular opportunities upon a client's request.
- Publishes resources on lease agreements and alternative tenureship.
- Establishes a referral network that farmers can utilize.
- Facilitates dialogue and business agreements with the two parties and other professionals.

Requirements:

- 1-1.5 full-time employees.
- Field and travel time.
- Operating annual budget of approximately \$75,000 after the first year.

Recommendation #3: Use a thorough but relevant application process to gather information from participants.

Applications are essential to gathering the appropriate information from participants, regardless of the match-making framework the land link selects. Another benefit is that applications can screen out individuals who are not serious about agriculture. Boxes 3.2 and 3.3 outline the various questions a land link should consider asking its applicants. The land link needs participants to communicate the specific things they want from a match, what they have to offer, as well as their values and objectives. A few open-ended questions will initiate that thought process and give land link staff a starting point for further conversations about what each party really wants out of a match.

Box 3.2: Questions for Landowners regarding Available Land

1. What has your land been used for in the past?
2. Where is the farm or ranch located?
3. How many acres do you own?
 - a. Tillable?
 - b. Irrigated?
 - c. Pasture?
4. What kinds of business agreements are you open to?
 - a. Purchase
 - b. Lease
 - c. Share crop
 - d. Other:
5. Is any of the property certified organic?
6. What kind of infrastructure is currently on the land?
 - a. Housing
 - b. Fence
 - c. Barn
 - d. Greenhouse
 - e. Other:
7. Are you willing to work with and/or mentor a beginning farmer/rancher?
8. What do you hope to gain or accomplish through a match?
9. What are your plans for your land in the next 1-5 years? And thereafter?

Box 3.3: Questions for Seekers regarding Land Needs

1. What kind of agricultural operation do you plan on?
2. Where would you like to farm or ranch?
3. How many acres do you need?
 - a. Tillable?
 - b. Irrigated?
 - c. Pasture?
4. What kinds of business agreements are you open to?
 - a. Purchase
 - b. Lease
 - c. Share crop
 - d. Other:
5. Do you require certified organic soil?
6. What kind of infrastructure do you need?
 - a. Housing
 - b. Fence
 - c. Barn
 - d. Greenhouse
 - e. Other:
7. Please describe your previous agricultural experience.
8. What do you hope to gain or accomplish through a match?
9. What are your plans for your land in the next 1-5 years? And thereafter?

Recommendation #4: Require seekers to have some agricultural experience. Then, let participants narrow their lists of possible matches, using a codified list.

Some land link programs go beyond the application process to filter out seekers who are unqualified and/or not genuinely interested in agriculture. Several of the landowners surveyed were also concerned about inexperienced and unreliable seekers. For these reasons, it makes sense to require seekers to have at least two years of agricultural experience. Then, the land link can either: a) present codified lists of opportunities to clients, and let them do the filtering; or, b) continue to actively filter the participants by hand picking a few options for landowners and seekers to consider. Until the lists of seekers and landowners reaches large numbers, it makes sense to give clients the entire lists of opportunities, summarizing the various opportunities. Once these lists become longer and the land link is paying higher postage and burdening participants with irrelevant information, staff can then re-evaluate whether or not to customize each participant’s list of possibilities. Allowing participants to choose their own possible matches puts them in the driver’s seat and reduces the amount of staff time required to facilitate links.

Using a codified list (see example below) will protect participants’ personal information from being widely distributed, while still allowing that information to reach the appropriate parties. Clearly, a codified list does not provide enough information to dive into a business agreement, but it is a starting point for participants to narrow their own lists of possibilities, and request further information on specific opportunities.

Codified List Example

Code ID	County	Town	Description of Property
245	Missoula	Potomac	180 acres available to lease, short-term only. 100 acres irrigated, 20 tillable.
246	Powell	Geary	240 acres of pasture. 100 a. irrigated, 140 dryland, 80 a. of which is forested. Used for sheep and has few weeds. Open to long-term lease or crop share.
247	Lake	Arlee	20 acres of irrigated, tillable soil, 5 acres of which is already in orchard. Available for purchase or working partnership.

Recommendation # 5: Link aspiring farmers and ranchers interested in gaining more experience to apprenticeships and on-farm/ranch jobs.

Many of the seekers might not have much previous agricultural experience, and the land link can help them gain knowledge, skills and experience by connecting them to farms and ranches looking for employees and apprentices. This service would be easy to include in a matching service's program, as it will require a similar infrastructure and linking process. According to Tara Comfort, a resource conservationist who works with landowners in Missoula County, ranchers often say that they cannot find reliable labor. Inexperienced seekers can prevent the matching service from working well for landowners, because landowners require dependable compensation as well as responsible land stewardship. Linking inexperienced seekers to on-farm/ranch opportunities could benefit both landowners and seekers.

Recommendation #6: Use both the internet and mailings to distribute and gather applications and maintain an initial level of confidentiality with participants' information by using a codified list.

One of the first steps to establishing a land link should be to set up a website, which can describe the program, discuss a variety of options for business arrangements between landowners and producers, and have links to the applications and other publications and resources. While the website will be an efficient way to keep up-to-date information at the public's fingertips, not everyone uses the internet, and hard copies of materials and applications should be mail to interested parties.

Recommendation #7: Visit landowners in person on their farms and ranches.

One of the strongest recommendations from land link professionals is to visit the farms and ranches enrolled in the matching service. Seeing the properties will help verify what landowners put in the applications, and meeting with the landowners will allow land link staff to hear more about their goals and plans for their land. These visits, of course, will require time and money—especially as the database increases its clientele. However, the visits should increase the matching success rate, as land link staff can more accurately convey the land opportunities to farm/ranch seekers. It is through personal relationships that the matching service will find success. Building rapport with landowners will enable

land link staff to encourage them to write thoughtful business agreements, describe the economic realities of agriculture to non-farming landowners, and navigate challenges as they arise.

I think these visits will be particularly important during the initial years of launching the matching service. With fewer landowners enrolled, it will not demand as much time, but it will help make the most of the handful of properties available. Plus, it is an opportunity to hear participants' feedback about how to improve the land link to meet their needs and concerns.

Recommendation #8: Speak with seekers in person or on the phone.

Meeting with farm and ranch seekers is also a valuable investment of time and should not require as much travel expenses, assuming many can visit the land link office, wherever it is centralized. Many of the seekers might also be ranchers looking for more pasture. Others might not live in the area, and a phone can initiate the conversation. By speaking directly with seekers, land link staff can listen to their true aspirations in farming or ranching, review their qualifications to start or expand an agricultural business, and discuss some of the options available. As all land link professionals mentioned, many farm/ranch seekers will not have sufficient agricultural experience. Developing a personal relationship with less experienced seekers is an opportunity to help them think through the realities of farming or ranching and guide them towards on-farm/ranch jobs and apprenticeships. The land link's priority should not be to simply help producers access fertile soil, but rather to guide those beginning farmers towards a match that will enable them to grow viable agricultural businesses.

Recommendation #9: Keep communication channels open with all participants.

Beyond meeting in person with farm/ranch seekers and landowners, the land link can facilitate communication between parties discussing a potential match. Continuous communication appears vital to keeping the process moving. Each seeker and landowner will have different needs. A non-farming landowner might lack a realistic idea of what to expect and require more "hand-holding." It is especially important to encourage participants to establish a thoughtful business arrangement on paper. This level of

facilitation is only possible if communication channels are open and personal rapport has been developed.

Recommendation #10: Facilitate thoughtful, explicit business arrangements between landowners and seekers, and encourage them to put contracts on paper.

Business arrangements can range from long and short-term leases to crop shares, outright purchases, or even partnerships, where the two parties manage the farm or ranch together. But these decisions are not for the land link to make; it is entirely up to the two parties to establish their own agreement. That is not to say, however, that the matching service should do nothing to facilitate the process. According to many land link professionals, most business arrangements are oral contracts and decided on a handshake. Beyond the legal trouble that can follow, misunderstandings about who is responsible for various tasks and scenarios frequently arise, because the details have not been thought out or discussed. The land link can encourage landowners and seekers to think through, communicate and write down their arrangements by being a part of the dialogue and publishing documents that clarify the tasks of discussing and writing a contract—including a step-by-step guide, a model of a few types of agreements, and case studies, grounding the process in real scenarios. Several land link programs have already created these documents and would provide good starting points.

Recommendation #11: Consider the number and status of staff required to launch a matching service and fulfill land link activities.

If there is one universal finding from speaking with land link professionals, the program's degree of success ultimately depends on whether there is adequate staff. According to several land link professionals, implementing and running a matching service will require one full-time employee, but this depends on the type of framework the land link chooses to approach match-making as well as the priority tasks for the first year. If the land link goes with a more involved model, it will be important to have at least one full-time employee eventually, assuming enrollment increases over time. But for the first year, a half-time employee might be sufficient to finalize the development of the matching service, establish a clear match-making process, set up a website and

database, create applications, promote the program, visit with interested parties, build a team of resource networks and partnerships, and fundraise for the creation of a full-time position for future years. In launching a matching service, time is the only issue facing employment; if someone can work forty hours a week, the program's infrastructure could be ready to run within a month. However, the matching season is from November to February, and it seems reasonable for a part-time employee to accomplish the necessary tasks by the fall of 2007. A part-time staff member, however, may not have enough time to effectively build partnerships and promote the program in the first year.

Recommendation #12: Find a home agency to incubate and possibly administer the matching service.

A home agency could provide the land link with office space and infrastructure, and possibly funding. Land link programs have been housed in universities, government agencies and non-profits. Depending on what CFAC wants to do with the proposed matching service, they could pitch the idea to some local organizations. Criteria for choosing a home agency could be:

- Relationships and credibility with landowners,
- Openness to various types of agriculture,
- Activities that compliment match-making,
- Possible funding,
- Commitment to the program's mission.

Alternatively, CFAC could incubate the program with funding from grants and gifts. Once the matching service is running, however, it might be difficult for CFAC to continuously raise money, and the land link might either need to become its own non-profit or join an existing organization.

Recommendation #13: Set an annual operating budget for the first year to launch the matching service as well as a projected budget for following years.

Deb Heleba and Marion Bowlan had similar recommendations for an initial annual budget to launch the matching service: \$10,000-15,000 on top of one full-time salary, or roughly \$50,000 all together. The expenses in their estimate include: communications, equipment, office space and supplies, and travel. During the first year, there will be some extra financial costs to set up the database and website, but less travel

and postage will be needed since there are not any participants yet. I would also recommend that the land link spend a little extra money on promoting itself in the first year. The estimated budget, below, is loaded with variables but provides some ballpark figures for the start-up year.

Estimated Annual Budget for Year 1—Full-Time Staff

Expense	Amount
Salary, one full-time staff member	\$36,000
Travel, including gas and mileage	\$2,000
Database and website set up and design	\$1,000
Postage for mailing applications and materials	\$1,000
Communication, including phone and fax bills	\$2,000
Office supplies, including printing costs	\$4,000
Office equipment, such as a computer, phone, fax, printer & copier	\$2,000
Promotion	\$750
NFTN annual membership and conference	\$1,250
Total	\$50,000

If the land link were to employ someone full-time, as in the above estimated budget, staff would be able to spend more time on community outreach, farm and ranch visits, and partnership forging.

The budget depends on what the goals are for the first year. If the goals are to set up the infrastructure and processes, begin promoting the program, and fundraise for future years, a half-time employee might suffice, reducing the initial budget to roughly \$32,000.

After the first year, I strongly recommend that someone be hired full-time to direct and run the land link, assuming the matching service chooses to spend time in the field, meeting with landowners and seekers. However, there are several options the land link will have to weigh after a year of operation. For now, consider the budget estimate below, which corresponds to the match-making framework outlined under

Recommendation #2. Also, these budgets pertain strictly to a matching service. Over time, the land link might decide to add other services—such as workshops—which would compliment the matching activities. These would increase annual expenses, but there are several grant opportunities for educational purposes.

Estimated Annual Budget—Hybrid Approach: High Involvement/Arm’s Length

Expense	Amount
Salary, 1-1.5 full-time staff members	\$36,000-54,000
Travel, including gas and mileage	\$6,000
Postage for mailing applications and materials	\$2,000
Communication, including phone and fax bills	\$3,000
Office supplies, including printing costs	\$10,000
Rent and utilities for office space	\$7,000
Promotion	\$750
NFTN annual membership and conference	\$1,250
Total	\$66,000-84,000

Recommendation #14: Consider a variety of funding sources to implement and administer the matching service, keeping the program free for participants initially.

At the onset of the program, land link staff should do everything possible to encourage landowners and seekers to enroll in the service. Until the database contains abundant opportunities, participants cannot expect many matches to take place. Thus, the land link matching service should be free for anyone genuinely interested. If western Montana’s program turns out to be anything similar to the land links across the country, seekers will far out number landowners in the database, and many seekers might not be qualified to start an agricultural business. If this is the case, and the land link is having problems with people enrolling who do not really plan on entering a match, a nominal, one-time enrollment fee of \$10-40 could be charged to seekers.

Funding can come from a variety of sources for a matching service. Existing land links have found financial support from grants and local foundations; banks; federal, state and county governments; individuals; and local businesses.

Recommendation #15: Choose a relational database program, customize the templates for organizing and storing data, and become familiar with the software.

There are many database software programs. Choosing one that is user-friendly will save time and increase efficacy in the long-run. A relational database will allow staff to search potential matches by category, keep track of on-going conversations with clients, and crunch numbers for fundraising. The land link might consider using Salesforce or FileMaker Pro. Salesforce is free to non-profits, and FileMaker Pro seems to be accessible and user-friendly. If the matching service is piloted by a home agency, it might make sense to use whatever software they have in-house. Should the land link opt for Salesforce or FileMaker Pro, California FarmLink and Farm On have offered to give us their templates. A technical advisor could be hired to further customize the templates for organizing data and teach land link staff about how to get the most out of the database.

Recommendation #16: Create diverse promotional and outreach strategies with a clear and inclusive message.

In conducting phone surveys with landowners in Missoula County, one thing became crystal clear: there is a lot of confusion around what a land link matching service actually is. Even after describing the idea on postcards and over the phone, many landowners did not understand the gist of what a matching service would do. Before promoting the program, land link staff should have a clear and simple message they want to spread, making a note of where people have become confused in the past. In the phone survey, there were two main points some landowners did not understand initially: one, that it is a voluntary service; and two, participants will have complete autonomy to create their own business arrangements. But after discussing the matching service concept a little beyond a basic description, almost all landowners grasped how it would work, and

were generally more enthusiastic once they did. Landowners also wanted to know answers to the following questions:

- How are matches made?
- What are the goals of the land link organization?
- Can landowners get out of a contract if the seeker is destroying the land?
- Would they maintain agricultural status for taxes?

In promoting the program, it is important to note the initial confusion people might have about the land link and to be mindful of hot topics. For example, the language used should clarify that the matching service is simply a conduit, not a decision maker that will restrict the agency of interested parties. Land link staff should also be careful to not imply bias towards one form of agriculture over another—such as small scale over large scale, vegetables over cattle, or even organic over conventional. Farm transfer issues cut across all sectors of the agricultural community, and land linking is an opportunity to bring all kinds of stakeholders to the table without judgment.

Early in the process of launching the matching service, the land link should choose a logo, motto, and name for the program. These can then appear on promotional materials, as well as publications and applications. Next, the land link will need to prioritize its strategies for promoting the program and reaching potential participants. A website is an efficient way to reach anyone with an internet connection and lead landowners and seekers towards the steps they need to take to participate in the program. But the matching service should not rely on the internet alone to spread the word. Many promotional strategies are free, such as press releases, public service announcements on the radio, and partnering with organizations.

Press releases are an opportunity not only to promote the program, but also to tell success stories related to farm and ranch transfers, beginning producers, and the role the matching service played in facilitating a particular link. The agricultural community often feels that the end of a region's farming and ranching is inevitable, given all the news of producers going out of business and fertile soil being converted to developments. A few landowners surveyed also reflected that no one wants to start an agricultural operation and do the hard work for minimal economic returns. Promoting the land link can help foster a sense of hope within the community for agriculture. This optimism is essential to the future success of a land link program, as well as the region's agriculture.

Though they are not free, the matching service might consider placing ads during the season when producers tend to look for land opportunities—November to February. Radio stations and agricultural journals are often inexpensive venues to run ads, and radio stations will also make public service announcements for free and can spread the word about any land link events.

Partnering with other organizations will help the matching service expand its reach and access interested parties. For example, the Ravalli County Right to Farm and Ranch Board works with new landowners to the Bitterroot Valley to educate them about local land issues and tools to accomplish their goals for their properties. Partnering with such organizations might help the matching service grow its list of non-agricultural landowners.

Finally, word-of-mouth should be a significant component to the land link's promotional strategies. As one landowner mentioned, it will take time to trust that the land link is on the farmers' and ranchers' side, not that of development, before he would consider participating. The best way to generate trust in western Montana's communities is to meet with landowners and promote the program face-to-face. Often, this will be through individual conversations, but the matching service could also hold public meetings to present the program, receive questions, address landowners' concerns, and distribute applications.

Recommendation #17: Build a clearinghouse of guides, publications and resources to help land link participants navigate farm and ranch transfer issues.

Participants will face a variety of challenges related to farm and ranch transfers. Aspiring producers will be figuring out their production systems, marketing strategies, and business plans. Retiring farmers and ranchers will be planning their future finances and succession of their agricultural operations and estates. A land link can help facilitate successful matches by putting participants in touch with other resources. The first priority, however, should be to create and gather resources that deal specifically with linking. The program can publish case studies of farm/ranch transfers and a guide on how to write contracts between seekers and landowners as well as build a referral network of individuals and organizations that offer relevant services. The referral

network, for example, could include agriculturally savvy and friendly lawyers, consultants, creditors, financial planners, accountants, marketing experts and family counselors.

Recommendation #18: Develop partnerships with organizations that have an interest in the region’s agriculture, open space, land-based economies, etc.

A matching service is a pretty simple program and only addresses a small portion of the challenges facing farm and ranch transfers. Even when aspiring producers find land, they will need to figure out their production systems, markets, and business plans. The matching service cannot help seekers in all of these capacities, but it can connect them to other resources in the community—such as Extension, the University of Montana’s Program in Ecological Agriculture and Society, Montana Small Business Development Center, etc.—by creating a team of organizations that have different resources available to aspiring farmers. The land link and partners could also put on workshops to train beginning farmers. As John Baker, director of National Farm Transition Network, suggested, “There are not many programs still around that tried to run just a matching service.” The same goes for retiring farmers and ranchers: many do not know how to create a succession plan, navigate estate taxes, or know all the options they have for exiting agriculture. A network of organizations and individuals can help retiring farmers strategically keep their land in agriculture.

Recommendation #19: Create a timeline with clear project goals.

Early on, the land link should establish a timeline for matching service implementation with clear project goals. In doing so, consider the following steps during the first year:

- a. Find a home agency to pilot the program;
- b. Fundraise, write grants for staff time, website, travel, office and communication expenses;
- c. Hire one staff member to implement, promote and administer matching service;
- d. Write a mission statement and long-term vision for the program;

- e. Choose a logo, name and motto that reflect the land link's mission statement and long-term vision;
- f. Work with a technical advisor to customize a website and database;
- g. Draft and distribute applications;
- h. Promote the land link using the logo, name and motto;
- i. Put together a few publications and guides on navigating farm transfer issues;
- j. Build a referral network and team of partners;
- k. Gather feedback from participants about how land link is serving their needs.

In the second year, the infrastructure and processes should be well established, but land link staff can routinely evaluate program effectiveness based on experience and participant feedback. The matching service should also continue to promote the program, build partnerships and the referral network, fundraise, expand the clearinghouse of guides and publications, and consider undertaking the following activities as well:

- a. Spend more time in the field with clients, as participation increases;
- b. Establish a newsletter and system for updating participant's information and status in the database;
- c. Organize a workshop with partners for entering and/or exiting producers, based on their needs.

Recommendation #20: Join the National Farm Transition Network and attend their annual conferences.

It may be difficult to justify in a grant application or report, but one way or another, the land link should become a member of NFTN, and staff should attend their annual gathering. NFTN is full of valuable resources, and establishing relationships with the twenty-plus organizations that are also dealing with farm/ranch transfers and land linking is worth every penny of the \$250 annual membership fee. The annual conference is an excellent time to learn from those who are well seasoned in this line of work.

Conclusion

Western Montana's agricultural community could benefit greatly from a land link matching service. Having researched the perspectives of several land link professionals and local farmers and ranchers, CFAC can consider finalizing the development of and

implementing a matching program. The recommendations in this chapter provide some insights for getting started, but they should not be read as prescriptive. Rather, I would encourage CFAC and land link staff to consider all options when launching the program.

One of the obvious options—and temptations—might be to treat the matching service as merely a clearinghouse or alternative classifieds for land, thus eliminating the personal components. This type of shortcut would save time and money but probably not lead to many successful matches. And beyond a higher matching rate, the many ancillary benefits to the personal aspects of a land link would be cut as well. Another danger might be to think of the land link as an end in itself. While this professional paper focuses specifically on the matching service, there are many issues exiting and entering producers have to navigate. A matching service is a good starting point to put some options on the table for these parties to consider, but they will also need to be armed with the appropriate information and resources to successfully keep their land in agriculture, as generations come and go. If the land link is working directly with its participants, it can gauge which resources are most needed. Then, it can connect them to existing organizations with the appropriate services or create resources where they are lacking.

A matching service is a simple idea and should not be over-complicated to implement the infrastructure and processes. Launching the program, however, is just the first step of a long journey. It will take time to grow participation and “become part of the fabric of farm and ranch transfers,” in John Baker’s words. Thus, the program needs commitment from its home agency to be it for the long haul. With the proper match-making, promotional and fundraising strategies, a land link has the opportunity to fill a needed gap in western Montana’s agricultural community.

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APPENDIX A: ESTIMATED ANNUAL BUDGETS

High Involvement Approach

Expense	Amount
Salary, 2 full-time staff members	\$72,000
Travel, including gas and mileage	\$6,000
Postage for mailing applications and materials	\$2,000
Communication, including phone and fax bills	\$4,000
Office supplies, including printing costs	\$10,000
Rent and utilities for office space	\$7,000
Promotion	\$750
NFTN annual membership and conference	\$1,250
Total	\$103,000

Arm's Length Approach

Expense	Amount
Salary, 1 half-time staff member	\$18,000
Postage for mailing applications and materials	\$2,000
Communication, including phone and fax bills	\$4,000
Office supplies, including printing costs	\$10,000
Rent and utilities for office space	\$7,000
Promotion	\$750
NFTN annual membership and conference	\$1,250
Total	\$43,000

Hands Off Approach

Expense	Amount
Salary, 1 quarter-time staff member	\$9,000
Postage for mailing applications and materials	\$1,000
Communication, including phone and fax bills	\$1,000
Office supplies, including printing costs	\$5,000
Rent and utilities for office space	\$7,000
Promotion	\$750
NFTN annual membership and conference	\$1,250
Total	\$25,000