DEVELOPING A FAMILY CHARTER
A Template for Farm Transition Planning

_____
(family name)

The purpose of this family charter document is to clearly define individual roles, responsibilities and operating rules in writing transition and succession plans for the land and farming business. It establishes procedures for how the family communicates and makes decisions on the transition process. It lays out a blueprint for conducting the steps in the business transition and defines how the family works in an empowered manner, including setting out responsibility and authority. Finally, it complements our family coaching piece by facilitating stakeholder buy in: involving family members in the decision making process and obtaining their concurrence along the way.

Together, your family is asked to discuss and complete the following sections of this charter:

1. Purpose:

Suggested text: *To transfer management and assets so that the family farming business can continue*.

2. Background
(Summarize the transition team members and stakeholders and describe any special circumstances that will impact the process going forward.)

3. Scope
(State the scope, mission, and objectives for the transition and the family's role in achieving it. This can include the mission statement used on the Ag Transitions template as well as the main goals the family transition process must accomplish.)

4. Transition Team Composition

(Identify roles, responsibilities and the anticipated time/resources commitments for each over the anticipated duration of the planning process. Also identify specific functional level of expertise associated with each family or transition team member)

Transition Team Members	Role/Responsibility	Anticipated Commitment	Expertise Needed

5. Family Operational Plan

(Describe family operational plans for the transition process. This includes such activities as the family's decision-making procedures, ground rules for meetings, record-keeping protocol and agreed upon communication methods.

In our family meetings, we will honor the following ground rules:

-
-
-
-
-
-
-

We will make decisions and commit to action items by

Our family farm transition meetings will be (recorded, shared, preserved)

Our communication method(s) for discussing farm transition will be

To hold each other accountable, we will

OTHER

6. Transition Milestones and Schedule - SMART goals
(Include major activities and milestones forecasted along with realistic timeframes and business expenditures, when appropriate. For guidance, see www.agtransitions.umn.edu for the steps used by Ag Transition Partners business coaches.)

Activity/Objective	Person Responsible	Anticipated Deadline	Support Needed	Costs

7. Family Empowerment

(Define existing authority each family member already possess or additional authority needed to fully perform as envisioned by the transition plan objectives listed above, and the steps needed to ensure empowerment. Note: Delegation of authority is usually the formal handing over of power from one person to another. Empowerment is the gradual development of one's own awareness of skills, knowledge, and ability, i.e. empowering them to be able to do the job.

Name of Family Member	Areas of Authority	Steps to Empowerment

8. Signatures and Approval

(Each family member signs below and dates this document. By doing so, they are agreeing to the contents and being held mutually accountable for adherence.)

9. Maintaining Positive Family Relationships

In this section, list each family member, their DiSC® style and the three highest priories you need to remember when communicating to them or interacting with them on this plan.

Name	Style	Priorities (3)

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