

Chapter 8: Review

Topic 23: Transition Plan Review

Congratulations! You have now completed the development of your plan. This is an appropriate time to conduct a thorough review of your work to date and a discussion among all of the transition planning participants. Schedule a meeting to share your progress and make any necessary changes to your plan.

How will this help transition planning?

Transition planning requires dedication, communication, and the investment of much time and energy. Periodically pausing in order to review progress:

- supports open communication;
- allows adjustments to planning as necessary; and
- gives an opportunity for participants to celebrate the completion of important milestones.

Transition Plan Review Meeting Exercise

*** Each person involved in your farm's transition planning and any other stakeholders who have a vested interest in the farm business should meet to review your transition plan development to date.*

Instructions

1. Refer to the sample agenda on page 357 of the Appendix.



KEEP IN MIND:

- At the very least, your Transition Plan Review Meeting should include your farm business's management team, the retiring generation, and the succeeding generation. Additional stakeholders with a vested interest in your farm's transition may be included as your group sees fit.
- Consider using an external facilitator if you are concerned about the potential for conflict.



WHAT TO WATCH FOR:

- It is not unusual in many transition planning groups for one or more participants to be strongest/loudest. In a review meeting such as this one, it is very important that all participants are given the opportunity to share their perspective. It is the meeting chair's responsibility to ensure that all participants are given a fair chance to speak.
- As you compare and contrast participants' answers, note:
 - Are there major differences that could lead to conflict or create a stumbling block to completing the transition plan?
 - Does this meeting identify any underlying reasons for existing conflict in your operation?



EXERCISE:

Complete the Transition Plan Review Exercise according to the sample agenda included on page 357 of the Appendix.

Next steps

Congratulations on completing this topic. You are now a step closer to having a transition plan for your farm. You may now proceed to the next topic area of your Transition Plan. If this topic

brought up any new 'To Do' items, don't forget to make note of them, assign them as tasks as necessary to participants in your group, and define timelines for completion.

Planning progress



Topic 24: Accountant Review

The purpose of the accountant review is to present what you have accomplished to date in your transition planning to your accountant for review, and to begin discussions about the plan's implementation.

How will this help transition planning?

Discussing your plan with an accountant at this stage of plan development:

- opens the doors of communication between your planning group and your accountant;
- allows your accountant an opportunity to review your plan and identify any potential pitfalls or areas that require further consideration;
- can save significant time and money in the future;
- builds a more workable plan, ensuring necessary structures and supports are in place;
- helps keep all participants on track and moving the transition plan forward; and
- builds group confidence in and commitment towards the plan.

Accountant Review Exercise

*** Each person involved in your farm's transition planning and any other stakeholders who have a vested interest in the farm business should work through this exercise together.*

Instructions

1. As a group:
 - Decide who will go to the meeting with an accountant.
 - Assign one person to take notes during the meeting with the accountant.
 - Discuss and decide what information should be shared with an accountant.
 - Review your planning to date and formulate a list of questions to ask an accountant.
2. Make an appointment with an accountant. Inform him/her in advance what you want to talk about. Send an agenda, a list of discussion points and/or a list of questions in advance if you wish.
3. Prepare for the meeting by organizing information and questions.
4. After the meeting, distribute notes to all planning participants and meet with the entire planning group to discuss the accountant's feedback and recommendations.
5. Prepare to incorporate the accountant's feedback in the Final Plan Adjustment (Topic 26).
6. If the accountant suggests that any corrective actions are required, put the transition planning process on hold until the issues are resolved.



KEEP IN MIND:

- The more prepared you are for the meeting, the more you will get out of the discussions.
- The more prepared your accountant is for the meeting, the more you will get out of the discussion. As such, plan to send him/her information in advance.
- If you require a new advisor, refer to the *How to Choose and Work with an Advisor* document found in the Appendix section on page 358.



WHAT TO WATCH FOR:

- If a professional advisor brings up any major changes to your plan, asks significant questions your group is unable to answer, or surprises you with important information you did not know, do not leap forward to implementation. Take time to consider whether you need more group discussion, more time to prepare and plan, or more time with your advisors before implementation begins. Implementation can be costly and challenging. Proceeding with it without a solid foundation and fully-considered plan may be disastrous.



EXERCISE:

Complete the Accountant Review Exercise according to the instructions above.

Next steps

Congratulations on completing this topic. You are now a step closer to having a transition plan for your farm. You may now proceed to the next topic area of your Transition Plan. If this topic brought up any new 'To Do' items, don't forget to make note of them, assign them as tasks as necessary to participants in your group, and define timelines for completion.

Planning progress



Topic 25: Lawyer Review

The purpose of the lawyer review is to present what you have accomplished to date in your transition planning to your lawyer for review, and to begin discussions about the plan's implementation.

How will this help transition planning?

Discussing your plan with a lawyer at this stage of plan development:

- opens the doors of communication between your planning group and your lawyer;
- allows your lawyer an opportunity to review your plan and identify any potential pitfalls or areas that require further consideration;
- can save significant time and money in the future;
- builds a more workable plan, ensuring necessary structures and supports are in place;
- helps keep all participants on track and moving the transition plan forward; and
- builds group confidence in and commitment towards the plan.

Lawyer Review Exercise

*** Each person involved in your farm's transition planning and any other stakeholders who have a vested interest in the farm business should work through this exercise together.*

Instructions

1. As a group:
 - Decide who will go to the meeting with a lawyer.
 - Assign one person to take notes during the meeting with the lawyer.
 - Discuss and decide what information should be shared with a lawyer.
 - Review your planning to date and formulate a list of questions to ask a lawyer.
2. Make an appointment with a lawyer. Inform him/her in advance what you want to talk about. Send an agenda, a list of discussion points and/or a list of questions in advance if you wish.
3. Prepare for the meeting by organizing information and questions.
4. After the meeting, distribute notes to all planning participants and meet with the entire planning group to discuss the lawyer's feedback and recommendations.
5. Prepare to incorporate the lawyer's feedback in the Final Plan Adjustment (Topic 26).
6. If the lawyer suggests that any corrective actions are required, put the transition planning process on hold until the issues are resolved.



KEEP IN MIND:

- The more prepared you are for the meeting, the more you will get out of the discussions.
- The more prepared your lawyer is for the meeting, the more you will get out of the discussion. As such, plan to send him/her information in advance.
- If you require a new advisor, refer to the *How to Choose and Work with an Advisor* document found in the appendix section on page 358.



WHAT TO WATCH FOR:

- If a professional advisor brings up any major changes to your plan, asks significant questions your group is unable to answer, or surprises you with important information you did not know, do not leap forward to implementation. Take time to consider whether you need more group discussion, more time to prepare and plan, or more time with your advisors before implementation begins. Implementation can be costly and challenging. Proceeding with it without a solid foundation and fully-considered plan may be disastrous.



EXERCISE:

Complete the Lawyer Review Exercise according to the instructions above.

Next steps

Congratulations on completing this topic. You are now a step closer to having a transition plan for your farm. You may now proceed to the next topic area of your Transition Plan. If this topic brought up any new 'To Do' items, don't forget to make note of them, assign them as tasks as necessary to participants in your group, and define timelines for completion.

Planning progress



Topic 26: Final Plan Adjustments

In the previous two topics, your transition planning group met with a lawyer and an accountant. It is very likely that these advisors suggested changes or provided feedback on some or many elements of your draft plan. The purpose of the Final Plan Adjustments Topic is to ensure your group takes the time to discuss and/or incorporate the feedback and information generated from the meetings with professional advisors prior to proceeding with plan implementation.

Do not proceed with plan implementation until all advisors' recommendations and questions have been thoroughly considered. It can be costly (and sometimes very difficult) to undo transition actions once implementation begins. For this reason, it makes sense to adjust your plan based on professionals' advice prior to proceeding to implementation.

How will this help transition planning?

Discussing and incorporating advice and recommendations from professional advisors into your plan at this stage in the planning process:

- will foster open communication between planning group members;
- can save significant time and money in the future;
- builds a more workable plan, minimizing future pitfalls and ensuring necessary structures and supports are in place;
- helps keep all participants on track and moving the transition plan forward; and
- builds group confidence in and commitment towards the plan.

Final Plan Adjustments Exercise

*** Each person involved in your farm's transition planning and any other stakeholders who have a vested interest in the farm business should work together to complete this exercise.*

Instructions

1. As a group, review the notes from the meetings with the accountant and lawyer.
2. Openly discuss each advisor's comments. Specifically consider:
 - Is your group comfortable with each recommended change?
 - If so, proceed with making the change.
 - If not, discuss further. A subsequent meeting with the advisor may be necessary.
 - Does your group need additional information to answer any of the advisors' questions?
 - Did either/both advisors bring up any surprises that the group should discuss prior to proceeding?
 - Did either/both advisors bring up any serious concerns that need to be dealt with prior to

proceeding with implementation?

3. Revisit the Critical Issue Action Plan Topic (Topic 15 Part E). Make any necessary adjustments to existing action plans or create new ones.
4. Distribute the changes to any stakeholders who were not part of working through this Topic if you wish.



KEEP IN MIND:

- The more detail you use in making adjustments to the Critical Issue Action Plans, the better information you will have as a base from which to proceed with implementation.
- Paying careful attention to advisors' recommendations and comments and then incorporating them where appropriate will significantly increase the likelihood of a successful transition.



WHAT TO WATCH FOR:

- As you compare and contrast participants' answers, note:
 - Are there major differences that could lead to conflict or create a stumbling block to completing the transition plan?
 - Does this exercise identify any underlying reasons for existing conflict in your operation?



EXERCISE:

Complete the Final Plan Adjustments exercise according to the instructions above.

Next steps

Congratulations on completing this topic. You are now a step closer to having a transition plan for your farm. You may now proceed to the next topic area of your Transition Plan. If this topic brought up any new 'To Do' items, don't forget to make note of them, assign them as tasks as necessary to participants in your group, and define timelines for completion.

Planning progress



Topic 27: Accountant / Lawyer Sign-off

You group is almost there! In the previous topic, your group discussed and incorporated your professional advisors' recommendations into your draft plan. Now, your advisors need to take another look at your draft to ensure the adjustments your group completed answer all of their questions and fulfill all of their recommendations. Your group should receive an unqualified sign-off from both your lawyer and your accountant before proceeding with implementation.

How will this aid in transition planning?

Discussing your plan a final time with trusted advisors and gaining their sign-off on the plan:

- allows your lawyer and accountant another opportunity to review your plan and identify any potential pitfalls or areas that require further consideration;
- fosters open communication between your planning group and your advisors;
- can save significant time and money in the future;
- builds a more workable plan, ensuring necessary structures and supports are in place;
- helps keep all participants on track and moving the transition plan forward; and
- builds group confidence in and commitment towards the plan.

Accountant/Lawyer Sign-off Exercise

*** Each person involved in your farm's transition planning and any other stakeholders who have a vested interest in the farm business should work through this exercise together.*

Instructions

1. As a group:
 - Decide who will go to the meeting with a lawyer.
 - Assign one person to take notes during the meeting with the advisors.
 - Discuss and decide what information should be shared with the advisors.
 - Review your planning to date and formulate a list of last questions to ask the advisors.
2. Make appointments with the advisors. Inform them in advance what you want to talk about. Send an agenda, a list of discussion points and/or a list of questions in advance if you wish.
3. Prepare for the meeting by organizing information and questions.
4. After the meeting, distribute notes to all planning participants and meet with the entire planning group to discuss the advisors' feedback and recommendations.
5. If you learn, even at this last step, that any corrective actions are required, put the transition planning process on hold until the issues are resolved.



KEEP IN MIND:

- The more prepared you are for the meeting, the more you will get out of the discussions.
- The more prepared your advisors are for the meetings, the more you will get out of the discussions. As such, plan to send your advisors information/questions in advance.



WHAT TO WATCH FOR:

- If a professional advisor brings up any major changes to your plan, asks significant questions your group is unable to answer, or surprises you with important information you did not know, do not proceed with implementation. Take time to consider whether you need more group discussion, more time to prepare and plan, or more time with your advisors before implementation begins. Implementation can be costly and challenging. Proceeding with it without a solid foundation and fully-considered plan may be disastrous.



EXERCISE:

Complete the Accountant/Lawyer Sign-off Exercise according to the instructions above.

Next steps

Congratulations on completing this topic. You are now a step closer to having a transition plan for your farm. You may now proceed to the next topic area of your Transition Plan. If this topic brought up any new 'To Do' items, don't forget to make note of them, assign them as tasks as necessary to participants in your group, and define timelines for completion.

Planning progress



Topic 28: Final Meeting

CONGRATULATIONS!

Your transition planning process is complete! This is an appropriate time to hold a final meeting to share your plan and discuss plan implementation.

How will this help transition planning?

Transition planning requires dedication, communication, and the investment of much time and energy. Periodically pausing in order to review progress:

- supports open communication;
- allows adjustments to planning as necessary; and
- gives an opportunity for participants to celebrate the completion of important milestones.

Final Meeting Exercise

*** Each person involved in your farm's transition planning and any other stakeholders who have a vested interest in the farm business should meet for a final review of your transition plan.*

Instructions

1. Refer to the sample agenda on page 361 of the Appendix.



KEEP IN MIND:

- At the very least, your Transition Plan Final Meeting should include your farm business's management team, the retiring generation, and the succeeding generation.
- Your planning group may wish to invite additional stakeholders or attendees such as relatives, friends or others.
- Your planning group has invested significant time and energy in transition planning. You deserve to congratulate yourselves and celebrate. You have achieved a major milestone.



WHAT TO WATCH FOR:

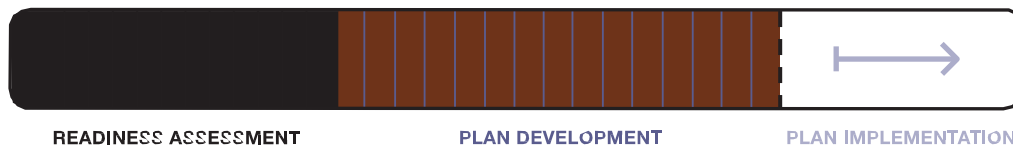
- At this point, your planning group is likely to be on a similar page regarding your transition's roll-out. However, if you choose to invite additional stakeholders to this meeting and you anticipate conflict, you may want to hire an external facilitator to chair the meeting.



EXERCISE:

Complete the Final Review Exercise according to the sample agenda included on page 361 of the Appendix.

Planning progress



Chapter 8: Recap Checklist

Complete the following checklist as you work through the Chapter 8 topics. For each topic, mark the 'Red Flag' or the 'Green Light' checkboxes that best suit your planning group's status upon completion of the topic's exercise. Red Flag marks indicate that your group may need to discuss this topic further or seek professional support.

	Red Flag	Green Light	Follow-up Necessary?	
			Yes	No
Topic 23: Transition Plan Review	<input type="checkbox"/> We were unable to complete this topic's exercise. <input type="checkbox"/> We do not have the information we need to complete this exercise. <input type="checkbox"/> One or more of us believes there is a reason we should not proceed to the next topic. <input type="checkbox"/> This topic resulted in significant unresolved conflict/disagreement within our planning group.	<input type="checkbox"/> We completed this topic's exercise. <input type="checkbox"/> We all agree we are ready to proceed to the next topic.		
Topic 24: Accountant Review	<input type="checkbox"/> We were unable to complete this topic's exercise. <input type="checkbox"/> We do not have the information we need to complete this exercise. <input type="checkbox"/> We do not have an accountant in place for our farm business. <input type="checkbox"/> Our accountant brought up significant concerns regarding our transition plan and/or transition planning process to date.	<input type="checkbox"/> We completed this topic's exercise. <input type="checkbox"/> We have a trusted accountant in place for our farm business. <input type="checkbox"/> Our accountant was comfortable with our transition plan and transition planning process to date and did not bring up significant concerns. <input type="checkbox"/> Our accountant answered all of our key questions.		

	Red Flag	Green Light	Follow-up Necessary?	
			Yes	No
	<input type="checkbox"/> Our accountant did not answer some or all of our key questions. <input type="checkbox"/> Our accountant believes our plan is unlikely to succeed. <input type="checkbox"/> This topic resulted in significant unresolved conflict/disagreement within our planning group.	<input type="checkbox"/> Our accountant believes our plan has good potential for success.		
Topic 25: Lawyer Review	<input type="checkbox"/> We were unable to complete this topic's exercise. <input type="checkbox"/> We do not have the information we need to complete this exercise. <input type="checkbox"/> We do not have a lawyer in place for our farm business. <input type="checkbox"/> Our lawyer brought up significant concerns regarding our transition plan and/or transition planning process to date. <input type="checkbox"/> Our lawyer did not answer some or all of our key questions. <input type="checkbox"/> Our lawyer believes our plan is unlikely to succeed. <input type="checkbox"/> This topic resulted in significant unresolved conflict/disagreement within our planning group.	<input type="checkbox"/> We completed this topic's exercise. <input type="checkbox"/> We have a trusted lawyer in place for our farm business. <input type="checkbox"/> Our lawyer was comfortable with our transition plan and transition planning process to date and did not bring up significant concerns. <input type="checkbox"/> Our lawyer answered all of our key questions. <input type="checkbox"/> Our lawyer believes our plan has good potential for success.		
Topic 26: Final Plan Adjustments	<input type="checkbox"/> We were unable to complete this topic's exercise. <input type="checkbox"/> We do not have the information we need to complete this	<input type="checkbox"/> We completed this topic's exercise. <input type="checkbox"/> We were able to carry out our accountant and our lawyer's		

	Red Flag	Green Light	Follow-up Necessary?	
			Yes	No
	<p>exercise.</p> <ul style="list-style-type: none"> <input type="checkbox"/> We were unable to carry out our accountant and/or our lawyer’s recommended adjustments to our plan. <input type="checkbox"/> Some or all of us were unable to decide/agree upon how our transition plan should be adjusted. <input type="checkbox"/> Some or all of us are uncomfortable with components of our final plan and/or are willing to proceed to implementation. <input type="checkbox"/> This topic resulted in significant unresolved conflict/disagreement within our planning group. 	<ul style="list-style-type: none"> recommended adjustments to our plan. <input type="checkbox"/> We were able to decide and agree upon how our transition plan should be adjusted. <input type="checkbox"/> All members of our planning group are comfortable with our final plan and ready to proceed to implementation. 		
Topic 27: Accountant / Lawyer Sign-off	<ul style="list-style-type: none"> <input type="checkbox"/> We were unable to complete this topic’s exercise. <input type="checkbox"/> We do not have the information we need to complete this exercise. <input type="checkbox"/> We do not have a lawyer and/or accountant in place for our farm business. <input type="checkbox"/> Our lawyer and/or accountant brought up significant concerns regarding our transition plan and/or transition planning process to date. <input type="checkbox"/> Our lawyer and/or accountant believes our plan is unlikely to succeed. 	<ul style="list-style-type: none"> <input type="checkbox"/> We completed this topic’s exercise. <input type="checkbox"/> We have a trusted lawyer and accountant in place for our farm business. <input type="checkbox"/> Our lawyer and accountant were comfortable with our transition plan and transition planning process to date and did not bring up significant concerns. <input type="checkbox"/> Our lawyer and accountant answered all of our final questions. <input type="checkbox"/> Our lawyer and accountant believe our plan has good 		

	Red Flag	Green Light	Follow-up Necessary?	
			Yes	No
	<input type="checkbox"/> This topic resulted in significant unresolved conflict/disagreement within our planning group.	potential for success.		
Topic 28: Final Review Meeting	<input type="checkbox"/> We were unable to complete this topic's exercise. <input type="checkbox"/> Some or all of us are uncomfortable with components of our final plan. <input type="checkbox"/> Some or all of us are unwilling to proceed to implementation. <input type="checkbox"/> This topic resulted in significant unresolved conflict/disagreement within our planning group.	<input type="checkbox"/> We completed this topic's exercise. <input type="checkbox"/> All members of our planning group are comfortable with our final plan. <input type="checkbox"/> We are ready to proceed to implementation.		

From **Topic 23, Chapter 8** (Phase 3: Plan Development)
Transition Plan Review Meeting Agenda

Date:

Time:

In Attendance:

1. Administration:

- a. Select one individual to act as the Chair of the meeting. Review their function and responsibilities (for help, review the job functions outlined in Chapter 3).
- b. Select one individual to act as the Notes Recorder of this meeting.
- c. Review decorum (optional)

2. Review previous meeting notes.

3. Discuss purpose of the meeting:

- a. Review overall progress in the transition plan since last meeting.
 - i. Make a plan to catch up in areas that are lagging behind (if needed).
- b. Address other concerns as needed.

4. Review the current situation:

- a. for each participant individually;
- b. for the group/family; and
- c. for the farm.
- d. General discussion and questions.

5. Discuss plan development specifics:

- a. Are all participants on the same page?
 - i. Does everyone acknowledge that plans and documents currently under development will be considered final and signed following the final review (Topic 28)?
 - ii. Make a plan to address disagreements (if needed).
- b. Conduct general discussion and answer questions.

6. Discuss concerns and issues:

- a. General discussion and questions

7. Timelines:

- a. Assign responsibilities with due dates.
- b. Set a date and time for the next meeting.

8. Adjourn

From **Topic 24 and 25, Chapter 8** (Phase 3: Plan Development)

How to Choose and Work with Advisors

A very important decision your group will face during the transition planning process is who to select as advisors.

An advisor's role is:

- to be an information resource to the farm management team; and
- to guide the team in their decision making process (not simply to tell them what to do).

The most important questions to consider when selecting an advisor are:

- How do I choose the right advisor?
- How can I get the most out of the advisor-client relationship?
- How should the relationship be structured?

What to Look for when Selecting an Advisor

Qualifications

Consider the career and educational background of a potential advisor.

- Do they have a farm background?
 - Is it important that they do?
- What education and experience do they bring to the table?
- What kinds of professional development have they undertaken? (A sign of a high quality advisor is that he or she is committed to investing in continuous learning and professional improvement.)
- Do they maintain a professional affiliation with any industry groups?
- Since there is limited regulation on who can act as a consultant or advisor, a good indication of a potential advisor's professionalism and training is whether they have a designation or other credentials from a regulating organization.

Communication and Conflict Resolution Skills

Communication is a critically important part of the transition planning process. An advisor will need to write and respond to emails, prepare documents and meeting agendas, and lead discussions at the meetings. A key factor in your relationship with your advisor will be how well he or she can effectively communicate.

Since there is a potential for conflict throughout transition planning, it is important that an advisor be experienced and skilled in conflict resolution. Such skills may be required to enforce decorum in meetings and bring differences of opinion to middle ground and resolution.

Steps to Follow When Selecting an Advisor

There are many factors to consider when selecting a professional advisor. It is best to make your selection based on their skills, knowledge and experience, and how specific their skillset is to your situation. Try not to be sold simply on experience, intelligence or determination.

1. Develop a detailed description of the objectives and requirements of the project.
2. Identify the scope of the work.
 - a. Include key concerns, timelines and budget limitations.
3. Research rosters or databases and take note of advisors that match your needs.
 - a. Contact each potential advisor, asking for a CV (professional resume) and list of past client references.
4. Rank each respondent.
5. Shortlist and interview.
 - a. Look for advisors who recognize your needs and demonstrate sound knowledge that will add value to your planning process.
 - b. Do research on the final candidates, via:
 - i. word of mouth / opinions of others;
 - ii. CV (resume) consideration;
 - iii. reference checks. Specifically determine:
 - iv. Whether the work conducted for the reference was similar to the work you want done?
 - v. Were the references satisfied with the work? If not, ask why?
 1. Be aware that a negative response may be due to the reference having unrealistic expectations of the advisor, or another issue that is not the advisor's fault.
6. Select the advisor:
 - a. Develop a written contract.
 - b. Ensure both parties sign the contract.
7. Consider errors and omissions insurance
8. Consider third party liability insurance

How to Use an Advisor

The relationship you build with your advisors will go a long way towards determining the success of your farm's transition plan. While each relationship will differ depending on the situation and people involved, there are some universal guidelines and tips that can help make things go smoothly.

1. Formalize the client-advisor relationship.
 - Knowing what is required, what the deliverables are, and what expectations you have of the advisor will improve the relationship.
 - Write an engagement letter, or have your advisor write one, that lays out the expectations from both sides and provides a plan if changes threaten to derail the process. The engagement letter should include:
 - project scope, objectives and understanding;
 - services;
 - delivery schedule;
 - limitations and liability;
 - advisor responsibilities;
 - client responsibilities;
 - project assumptions; and
 - fees, expenses and payment terms.
2. Formalize the fee structure. Before agreeing to anything fee-related, consider:

- How will fees be charged?
 - by the hourly contract
 - contingency based
 - retainer based
 - negotiable
 - Note: You should feel comfortable asking your advisor for a breakdown of the time billed to you. Final payment holdback can be used to make sure work is completed as per the engagement letter.
3. Communicate, communicate, communicate
- Disputes are often caused by a breakdown in communication.
 - It is important to bring an issue to the table as soon as you detect a problem.
 - Refer back to the contract (engagement letter) when conflict occurs.
 - Professional conduct and insurance can sometimes play a role in solving disputes.
 - There is a mutual responsibility for both parties to ensure information flows to each other.
4. Determine Timelines and Deliverables
- Staying on track is important! An effective way to prevent conflict is for both the transition planning group and the advisor to work hard to meet timelines and agreed upon deliverables.

From **Topic 28, Chapter 8** (Phase 3: Plan Development)
Transition Plan Final Meeting Agenda

Date:

Time:

In attendance:

- 1. Administration:**
 - a. Select one individual to act as the Chair of the meeting. Review their function and responsibilities (for help, review the job functions outlined in Chapter 3).
 - b. Select one individual to act as the Notes Recorder of this meeting.
 - c. Review decorum (optional)

- 2. Review previous meeting notes.**

- 3. Discuss purpose of the meeting:**
 - a. Share the finalized transition plan.

- 4. Review the current situation:**
 - a. For each participant individually;
 - b. For the group/family; and
 - c. For the farm.
 - d. General discussion and questions.

- 5. Discuss plan review specifics:**
 - a. Review the lessons learned in the transition planning process.
 - b. Discuss plan implementation.
 - c. Conduct a general discussion and answer questions.

- 6. Discuss concerns and issues:**
 - a. General discussion and questions

- 7. Timelines:**
 - a. Assign responsibilities with due dates.
 - b. Set a date and time for the next meeting.

- 8. Adjourn**