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Cultivating narratives: Cultivating successors

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Abstract

This paper analyzes oral histories of eight northwest Ohio farms on the theme of farm succession. We report several significant findings: a process of succession that is less orderly than some recent studies suggest; that farmers hope for, even expect succession but do not plan for it; the importance of wives to the adaptation and diversification of on-farm operations; and that contrary to some claims, the "farmer's boy"–type successors can innovate and adapt, suggesting the future of family farms may be in sounder hands than some believe.

Keywords

family farms, farm transfer, floriculture, intergenerational succession, Ohio, oral history

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Introduction and Background of Study

While much of the popular and academic narratives surrounding "the family farm" have focused on the various crises that have threatened their existence, family farms persist (Calus & van Huylenbroeck, 2010; Inwood, 2008; Machum, 2005). The persistence of small family farms seems

to defy the logic of industrial capitalism (Friedmann, 1978; Mann & Dickinson, 1978). Even a cursory examination of the literature demonstrates that few farmers view their activities solely through the lens of industrial farming, which emphasizes economies of scale, debt, substitution of capital for labor, and profit maximization. Research on rural survival strategies in both the U.S. and Europe point out how family farmers have diversified their operations to include alternative farm activities and/or off-farm income sources to stabilize the household's finances (Barbieri, Mahoney, & Butler, 2008; Bessant, 2006; Inwood, 2008). The purpose of this paper is to closely examine one of three themes to emerge from oral histories of northwest Ohio farmers: succession. The process of succession of family farms, that is farms whose owners manage and rely almost solely on their own and family labor to operate the farm business(es), is important not only to the families involved as a part of intergenerational wealth transfer, but also to the ongoing productivity of the nation's agricultural system.

Why Concern for the Future of Small Family Farms?
To some this seems an odd question to pose. A Google search of "why save the family farm" suggests that public sentiment overwhelmingly supports saving the family farm. However, scholarly examinations of the facutual reality of the public's view demonstrates it is inaccurate, especially relative to the current situation with regards to farming (Conkin, 2008). Family farms are still overwhelming the norm. What has changed is the number and size of farms, the mix of what they grow, and the relationship between farmers and their consumers (Census of Agriculture, 2007a).

Some (Bahls, 1997) argue that it is misplaced to be concerned about transformations in agriculture. This view holds that farmers who cannot adapt to the industrial model of farming should be forced out of business in the name of economic efficiency. They argue for the inevitable workings of the market (Conkin, 2008). This view, however, ignores the effect of current policies on favoring certain players or types of farming operations over others. Despite the reasons offered by historians and economists, there are at least three reasons to be concerned about the future of small family farms: sustainability, food security, and demographics.

Sustainability. Ikerd (2008) argues that economics emphasizes short-run self-interest and devalues stewardship. Profit-maximization, he argues, inevitably leads to the degradation of soil, water, and air, which are necessary to grow food. "Stewardship," a value that is inherent to the small family farm where a lifestyle is passed on to younger generations, is not inherently about self-interest, but about the common good, which he argues is not rational according to economics. Economic viability of the family farm is necessary, but viability and profit-maximization are not the same thing (2008, p.114). The corporatization of farming, Ikerd (2008) argues, leads to soil depletion as the short-run interests of the corporation lead the soil to be "mined," rather than managed or conserved. As more farmers decide to sell out rather than pass on holdings, this increases the pressure on them to mine the soil rather than manage or conserve it.

Food security. Food security is usually a concern in the developing world, not in the developed North. Lawrence, Lyons, and Wallington (2010) argue that food security goes beyond food availability to also encompass agricultural diversity, regional prosperity, environmental integrity, biodiversity, and the predictability and fairness of the system of production, sale, and delivery. In these areas, they argue, we see degradation, especially over the last 30 years or so. Perhaps the most telling difference between food security in the developing world and in the developed North, is that in the North food is abundant but nutritionally poor (Lawrence, Lyons, & Wallington, 2010, p. 7). In short, fresh foods are more nutritious, and fresh foods are more likely delivered locally by smaller family farms.

Demographics. Since succession can be a time of vulnerability for a farm, it is a key issue for the future of small family farms. Yet, young people are

not farming. Farming may be, demographically, the oldest occupation, with farmers averaging over 55 years (Conkin, 2008, p. 148). Add to this the low rate of succession planning among family-owned farms (Mishra & El-Osta, 2007) regardless of size, and these facts threaten the future of the family-owned farm regardless of reasons for maintaining them, even in states with anticorporate farming laws (Bahls, 1997). It is succession that is the focus of this paper.

Study Area

This research examines family farmers in northwest Ohio (hereafter NW Ohio). Historically, NW Ohio was a rich and diverse agricultural area, but it is now characterized by rapid suburbanization (from Toledo, Ohio, and southeast Michigan). Like many Midwest subregions, it has experienced a decline in the total number of family farms as well as overall acreage in agricultural production. In addition to standard agricultural products such as commodity grains, vegetables, and some livestock, the NW Ohio area also has a long history of general floriculture. NW Ohio's floriculture industry is a major production center. The region's family-based (owner-operated) floriculture industry is characterized by both large-scale and small-scale greenhouse operations serving both as wholesalers and retailers. This research project was focused initially on floriculture, as the region's industry was threatened by competition related to NAFTA[1] from the nearby Canadian province of Ontario (Reid, Smith, Gatrell, & Carroll, 2008). However, the research team quickly realized that most farmers are engaged simultaneously in traditional field crops and floriculture, and that the challenges went well beyond that of international competition.

Since 2004, NW Ohio agriculture has been the focus of an intense research initiative on greenhouse growers that has recently been expanded to include the region's entire local food system. The research program was developed in response to U.S. Representative Marcy Kaptur's interest in family farms, and U.S. Department of Agriculture (USDA) funding has been used to identify mechanisms (policy, science, and/or market-driven) to enhance the overall competitiveness of NW Ohio agriculture and enable farmers to navigate the challenging terrain of maintaining the family farm. For Rep. Kaptur, the issue of the family farm was not purely an economic concern. While family farms play a critical role in the region's economy, the values attributed to family farms and the degree to which they reflect the unique cultural heritage of NW Ohio was also a critical — albeit symbolic — concern. That is to say, increased suburbanization and heightened competition threaten the historical identity of NW Ohio and the viability of its family farms. As part of the project and under the primary leadership of the University of Toledo, a network of greenhouse growers was created to support and enhance the local industry vis-à-vis a number of projects, including collaborative marketing, bulk energy purchases, and other collective action (Reid, Carroll, & Smith, 2007; Reid & Carroll, 2006a, 2006b; Reid, Smith, Gatrell, & Carroll, 2008; Gatrell, Thakur, Reid, & Smith, 2010). In practical terms, the research project sought to establish a distinct economic cluster organized around specialized agriculture inclusive of floriculture.

Over the course of grant cycles, the team has examined the perceptions of growers, their marketing and production activities, and their business practices (see Gatrell, Reid, Steiger, Smith, & Carroll, 2009; LaFary, Gatrell, & Griffey, 2005; LaFary, Gatrell, Reid, & Lindquist, 2006). In the process, researchers recognized that the practices and strategies associated with local farmers (in this case primarily greenhouse growers) were not in the strictest sense "rational" That is to say, the decision-making practices of greenhouse growers and their resulting business practices were simultaneously driven by cultural factors — not just economics (Gatrell et al., 2009). Indeed, family concerns have informed and shaped the everyday business practices of these farmers, for example experimenting with new crops to create an income stream for an adult child, diversifying to utilize the

[1] NAFTA = North American Free Trade Agreement. According to Investopedia (http://www.investopedia.com), "[NAFTA is a] trade agreement between Canada, the United States and Mexico that encourages free trade between these North American countries."

special skills and interests of family members, or lending equipment to help a relative start up a new farm business.

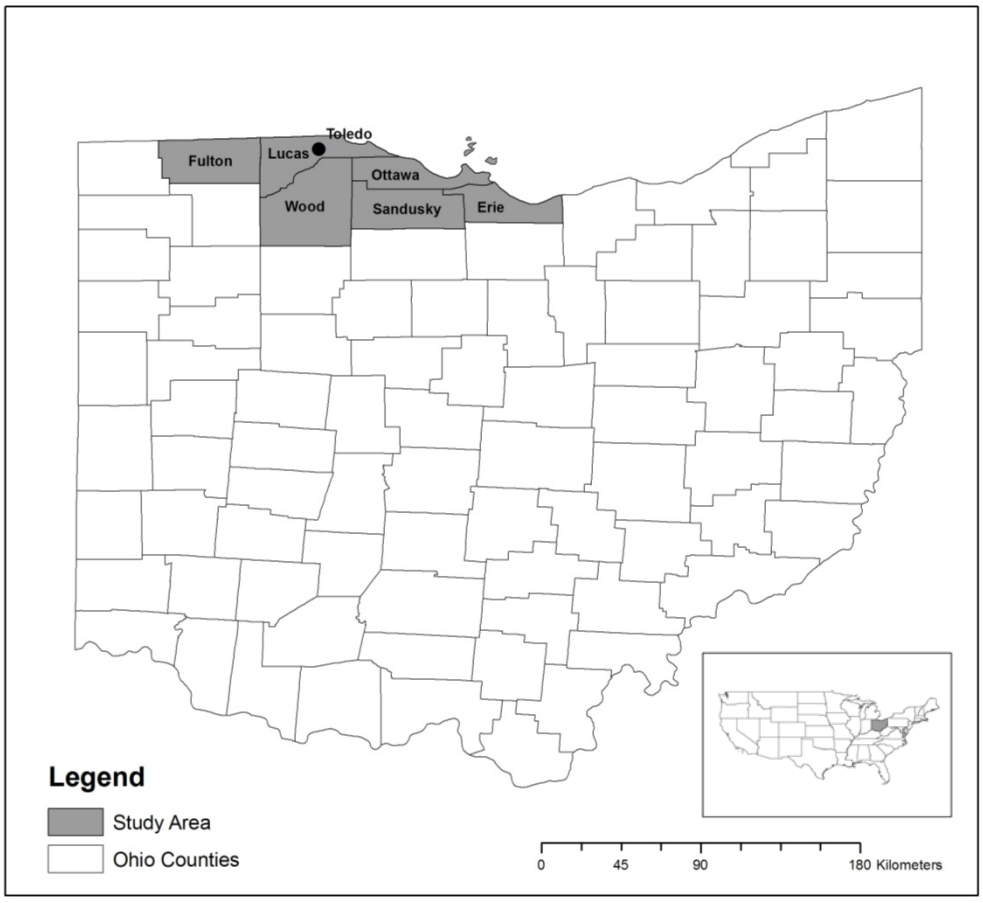
In 2009, the University of Toledo's Urban Affairs Center obtained a grant from the Ohio Humanities Council to document the oral histories of farmers. The oral histories initiative not only document the histories of the farmers, but also provided the research team from the University of Toledo, The Ohio State University, Bowling Green State University, and Indiana State University with new insights into the everyday lives of family farmers, their practices, and their families. More importantly, oral histories provide an opportunity for the interviewee to define the issues instead of having them defined for them by the interviewer. This paper reports the findings on the theme of succession that emerged from the oral histories of NW Ohio farmers.

The collective efforts of the larger research project to investigate the plight of family farms across NW Ohio within the context of a shifting economic and policy landscape (most notably NAFTA) has underscored the importance not only of family, but also the many forces facing family farms and succession. Factors such as suburbanization, big box stores, changing property tax structures, the emergence of new expensive technologies (such as point-of-sale inventory control systems), increased international competition, the perceptions of growers with respect to the trajectory of the overall industry, and the career preferences of future generations inform the succession strategies of individual growers. These factors as well as the cultural imperatives associated with "family," coupled with changing conceptions of "family," make the succession issue especially complex in urban, suburban, and peri-urban regions such as NW Ohio (Inwood, 2008).

NW Ohio Agriculture in Context

For the purposes of this study, northwest Ohio has been defined as the Toledo Metropolitan Statistical Area (MSA) (made up of Lucas, Wood, Fulton, and Ottawa counties) and the two adjacent counties of Erie and Sandusky (figure 1). As table 1 indicates, the total land in farms and mean farm size declined between 2002 and 2007 for the state and counties.

Figure 1. The Northwest Ohio Study Region



Statewide the overall trend was a decrease in total farms; however three counties observed a net increase. With respect to the overall productivity and value of agricultural goods, the trend was an upward one across the region, but the increase was most pronounced in Ottawa and Fulton counties. The poorest performing county across nearly all metrics (except mean farm size) was Lucas, home to the region's anchor city, Toledo. Finally, it should be noted that government payments and related subsidies per farmer declined as well (USDA National Agricultural Statistics Services [NASS], 2007b, 2007c).

The data with respect to the observed change in total farms and the observed decrease in mean farm size suggests that small farms persist. Indeed in three counties (Erie, Ottawa, and Wood) the number of farms increased. When compared to national trends that indicate an increase of 4% in total farms between 2002 and 2007, the performance of Ohio and most counties in the region may be disheartening to some. Yet the observed growth in Ottawa, Wood, and Erie counties suggests that farming may be on the rebound. In fact, the 2007 national figures represent the first expansion of the number of farms since World War II (USDA NASS, 2007b). Likewise, the observed trend toward smaller mean farm size between 2002 and 2007 is consistent with the trends observed nationally. While the decline in the total number of farms has halted and many objective indicators suggest growth in the industry nationally, the experience and perceptions of NW Ohio farmers continue to be shaped by cultural and political narratives that reinforce images of "decline" and "fear" associated with heightened competition.

Table 1. Farm Change in Northwest Ohio, Selected Indicators, 2002–2007

	Total Land in Farms (% change)	Mean Farm Size (% change)	Total Farms	Total Product Value (% change)	Mean Government Payments (% change)
Ohio	–4	–2	–2	66	–11
Lucas	–19	–12	–8	16	–41
Wood	–10	–18	10	55	–15
Erie	–11	–14	3	24	18
Fulton	–7	–4	–3	91	–11
Sandusky	–8	–5	–3	55	–26
Ottawa	1	–12	14	93	–26

Source: USDA NASS, 2007d

Research Methods and Data

According to Yow, "oral history is the recording of personal testimony delivered in oral form" (2005, p.3). The approach is inductive, that is, no formal hypotheses have been formed by the researcher. Indeed, often the aim of the oral history is to preserve the "testimony" for posterity. Only later, after the recording and transcribing is complete, are the documents examined for emergent themes and hypotheses or research questions formed.

Use of oral history as a method of inquiry differs from conventional surveys or face-to-face interviews, where the researcher assumes total authority for knowledge and the subject is a passive conveyor of information to an authority. With oral history, the relationship between interviewer and interviewee is different. Both are seen as holding authoritative knowledge about the situation; the interviewer perhaps has knowledge about the larger context in which the narrator lives, but the interviewee is the recognized expert on his or her experiences and understanding of the situation. Together, the interviewer and interviewee produce new understandings and knowledge. There is no claim, however, to complete objectivity (Yow, 2005, pp. 1–2). Indeed, it is the interviewee who ultimately determines what is important by story-telling about it. The researcher seeks common patterns among what the individual narrators see as important. As social

historian Paul Thompson notes,

> One of the greatest advantages of oral history is that it enables the historian to counteract the bias in normal historical sources; the tendency, for example, for printed autobiography to come from the articulate professional or upper classes, or from labour leaders rather than the rank and file. (1988, p. 125)

The discovery of patterns and themes is objective, but the substance — the themes themselves — are inherently subjective. The analysis presented here is in the voice of farmers as framed by social science concepts.

These oral histories were collected as part of "Sustainability Family Style: Documenting the Lives of Growers, Gardeners, and Family Farmers in Northwest Ohio," a project funded by the Ohio Humanities Council in 2009.[2] The oral history project preserved the stories of these farms. The process of oral histories is often to just let the interviewee talk. The interviewee more than the interviewer defines what is important, what he or she wants preserved.

Farms were identified through local contacts. Farms were included that had multigenerational local connections. Hence, farms were included where existing farms had passed directly to a child or relative and new operations where the farmer had relatives who operated other farms. Consent was obtained from all participants to create the oral histories with the understanding that confidentiality, because of the nature of oral histories, could not be promised. Nevertheless, we use pseudonyms for both individuals and the farms as their true identities do not add anything to the substance of the findings and recommendations.

Eight farms were included in the data analyzed for this paper. Brief descriptions of these farms can be found in table 2 along with the pseudonyms of the farmers associated with them.

Surnames that match reflect family relationships among individuals. Sixteen people were interviewed. In two cases, a husband and wife were conjointly interviewed. In the others, family members were interviewed separately. In two cases, a future successor to the farm was interviewed. The conjoint interviews were separated for purposes of analysis to make for 16 interviews comprising oral histories of eight family farms in northwest Ohio. Interviews lasted between nine and over 60 minutes, with an average of 20 to 25 minutes.

NVIVO™ software (QSR International, version 8) was used to code the interviews and identify emergent themes. Analysis of the interviews occurred in three steps: coding, frequencies, and themes. Initial coding yielded 48 different codes. The next step was to examine two dimensions of the frequency in which codes appeared. The first was in how many sources (interviews) they appeared, and the second was in how many references (instances) the code appeared across all sources. (A single source could have multiple "references" of the same code). In short, focusing on the most frequent codes in terms of both sources and references helped us identify the emergent themes. This process produced three emergent themes: (1) succession (the passing of farming and the farm into the next generation); (2) gender relations; and (3) challenges to surviving locally in an industrial world. The third round of analysis created a dialogue between the oral history themes and published research related to the theme. This process may also result in further coding to examine the fit of the oral history data with other publications using different data sources and theories.

Results: Succession May Be the Ultimate Measure of Success

Identifying a successor and planning for succession are perhaps the most important issues that most family farmers face (Mishra & El-Osta, 2008). They drive economic decision-making on the farm (Inwood, 2008) and together are an "essential

[2] The complete audio files of the oral histories can be found at http://uac.utoledo.edu/mvgoh/mvg-oh.htm (University of Toledo Urban Affairs Center, 2011).

Table 2. Brief Sketches of the Farms and Greenhouse Operations

Dietrick's Greenhouse (Tony and Luke) Dietrick's Greenhouse was established in the late 1890s by Tony's grandfather. It originally had retail shops selling cut flowers, but the operation is now a single 8-acre (3.2-hectare) greenhouse operation growing strictly for wholesale. Tony Jr., the current president, started in 1976. The owners now focus more on potted plants, bedding plants, and hanging baskets. They employ nearly 50 people and have been successful in the wholesale business by doing the majority of their business with other independent businesses. Tony Jr.'s son Luke, who is the fourth generation, works in the business and is preparing to run it himself one day.
Evans' Greenhouse (Frank and Natalie; Mike) Evans' Greenhouse has been in operation for over 25 years. The owners grow primarily bedding plants and flowers for their prized hanging baskets, as well as produce. Frank's grandfather began farming in northwest Ohio, beginning with livestock but eventually shifting to vegetable production. Frank and Natalie were living and working on the family farm when a greenhouse operation across the street became available. They bought it and Frank taught himself how to grow tomatoes in the greenhouses. They originally grew tomatoes for processing, but shifted to farm stand production when the processing plants began to close. The Evans' sons are actively involved in the business, with each family member having distinct responsibilities. The Evans also grow commodity crops.
For the Future Farms CSA (Tim Hutchens) Shared Legacy Farms is a small vegetable farm that was established in 2008, as a subsidiary of Hutchens Farms. Tim grew up on his parents' farm, then spent time in Europe and Chicago learning new technologies and philosophies. He returned home and, with the help of borrowed equipment and advice from his parents, he and his wife created For the Future Farms CSA (community supported agriculture operation) with the goal of promoting sustainable agriculture and fostering relationships between farmers and local consumers. The CSA model allows them to create relationships and ensure they have a guaranteed market before they start planting. They strive to use organic practices wherever possible.
Hutchens Farms (Denise and Carl) Hutchens Farms was founded in 1940 by Carl's parents, originally operating as a dairy farm and vegetable farm, raising primarily sugar beets, pickles, and tomatoes for processing. In 1941, they shifted away from dairy production and focused on vegetable production. Carl and Denise took over the farm in 1982. Denise became interested in flowers and plants, specializing in rare varieties. The Hutchens moved away from growing tomatoes and sugar beets for processing, as many of the local processing plants shut down, and they now focus on growing vegetable varieties for their roadside market. They are especially known for their sweet corn. The Hutchens do still grow some commodity crops.
Norton's Greenhouse (Tom and Barbara) Established in 1941, this farm and greenhouse began with two brothers, Tom's father and uncle, growing wheat, soybean, and field corn, but by the 1950s they were focusing more on vegetables, growing up to 30 acres (12 hectares) of tomatoes to be sold to a tomato processor for ketchup. In 1962 they built their first greenhouse. Through the next decade they built more greenhouses and added orchards. They opened a produce market in 1975 to meet growing demand for homegrown produce. In 1980, the brothers divided up the business. Tom's father took the greenhouse operation, and father and son started growing flowers in flats for the greenhouses. In 1983 they opened the retail store. Tom took over the business from his father, and today Tom and his wife Barbara own and operate the 20-acre (8-hectare) farm and business, including plants, flowers, orchards, and field crops. They have 6 children, many of whom are involved in the business.
Willow's Greenhouse (Nate and Gary) Willow's Greenhouse has been in operation since 1893. The greenhouse has had different locations throughout the years. Nate is the fourth generation of Willows to work the business, and his son Gary is the fifth. The Willows grow primarily bedding plants, annuals, and perennials. They are strictly a greenhouse operation; they do not grow field crops. Over the years they have begun to shift from being a wholesale seller to a retailer. At one point much of their wholesale production was for a family member's retail operation.
Yancy Lake's Greenhouse (Yancy) Yancy Lake's Greenhouse was established in 1989 when Yancy, the son of Sam Lake, Jr., and Nancy Lake, purchased his own land and left the family farm business. Yancy Lake's Greenhouse originally had several greenhouses dedicated to wholesale, but as small independent stores began to close, the business lost clientele and has shifted toward retail. Most of its retail sales are to its loyal customers at the area's farmers' markets. It grows bedding plants, cut flowers, and produce.
Zaichek Gardens (Terrence, Mark, and Ed) Zaichek Gardens began with no family history of farming. Ed's uncle, a painter by trade, decided to try his hand at farming based on his love of the outdoors. Ed and his two sons have all had to work outside the business to make ends meet, but they keep the business because they love it. They grow bedding plants, annuals, hanging baskets, and field crops. In the past they sold produce to independent grocers, but with the closure of those types of stores they now focus on direct-to-consumer sales.

question" (Lidestav, 2010). That succession emerged as a theme from the oral histories seems to support the importance of the issue to family farmers. Yet according to a national survey on family farms, just 34% of farm operators who plan to retire within five years had succession plans (Mishra & El-Osta, 2007, p. 4).

There is much scholarly research on farm succession. One thread of that research furthers understanding of farm succession by categorizing the outcomes of succession and/or the process. An excellent example of that approach is Lobley, Baker, and Whitehead (2010).

Types of Succession

Lobley, Baker, and Whitehead (2010) offer a typology for the succession process as well as a typology of successors based on cross-cultural data from the U.S., Canada, the U.K. and other European countries, Japan and China. Their analysis suggests two routes to succession: (1) the direct route, where successors go directly into farming after leaving school; and (2) the diversion route, where successors are employed in an off-farm job after school and return to the home farm at a later date (Lobley, Baker, & Whitehead, 2010, p. 56).

The authors go on to identify four types of successors: (1) the farmer's boy, who has little to no responsibility for decision-making and mostly provides manual labor; (2) the separate enterprise, where the home farm is large enough to support a second one run by the successor; (3) the stand-by holding, where the successor is set up on a separate holding to develop his or her skills; and (4) a partnership, where the successor shares decision-making responsibility with the farmer to learn necessary skills to take over (Lobley, Baker, & Whitehead, 2010, pp. 56–57). The different paths and successor types offer different levels and kinds of experiences that may impinge on the eventual success (and next succession) of the farm.

After the initial coding of the oral histories was completed and succession identified as a theme, the data was recoded into "routes" of succession and into "types" of succession. Lobley, Baker, and Whitehead's (2010) descriptions and operationalizations informed that recoding.

Each of Lobley, Baker, and Whitehead's (2010) routes and types were evident among the eight farms. However, while Lobley, Baker, and Whitehead's data focused on the farmer and future succession, the oral histories were taken of current farmers who had inherited the farm (making themselves successors). Interviews were also completed with at least two likely future successors, capturing somewhat the process of succession as it is happening. The oral histories provide some insight into: (1) the succession of the current farmer from the last generation; and (2) succession of the next generation. This provides a three-generation view of some of these farms.

The oral history data also suggest that the process and types of successors may be not as clean as suggested by Lobley, Baker and Whitehead (2010). For instance, six of the eight farms show evidence for a direct route of succession. A particularly good example: "Then in 1980 I was, uh, I graduated. My dad said he would retire when I graduated. So I took over for him" (Tom Norton). There is one ideal example of the diversion route:

> I worked for a wholesale plant nursery for seven years out in Chicago…It was a pretty big facility, it was about, I'd say maybe one of the top ten wholesale nurseries in the country. And a really good place to work for…then I sort of just got a chance to develop into who I really am today. Because if I would've stayed in Ohio, everybody knows the Hutchens name and I would have gotten a lot of favors because of my last name. Out there I made a name for myself and I grew upon that and it really helped me out. (Tim Hutchens)

Others, though, seem a combination of the direct and diversion routes; call it an "indirect" route:

> Well, I always worked here, but, I drove a milk, Pet Milk truck in the winter for a

> couple years, and I drove cab for about 10 years to pay for my house. And I worked at Heinz when I was in school. (Ed Zaichek)

The oral histories also show examples of most types of successors identified by Lobley, Baker, and Whitehead (2010). A good example of the farmer's boy: "Grew up, grew up working the fields. Just kind of basically learned everything on hand" (Tom Norton).

Natalie Evans provides an example of a (developing) "partnership":

> And as the kids got bigger and started to be more involved in the operation, Mike went to school at ATI and when he came back then he took over seeding, and just been trying to teach the next generation what we know and what we do.

Tim Hutchens provides an example of a "separate enterprise":

> But, you know, my brother and sister say why don't we all farm together and my parents have been against that because they've seen, with my father's experience with his brothers and my grandfather, how that didn't work at all. So we're sort of going about it a different avenue where we each have our own businesses, so my brother grain farms right now and I do vegetables, the CSA thing.

Others defy the categorization suggested by Lobley, Baker, and Whitehead (2010). The literature on succession seems to assume a single successor, but in one case in NW Ohio, there are multiple partners who eventually will take over:

> We're all kind of team players, but dad gets, say, five to eight houses that he's responsible for, and then my brother gets—we just kind of divide it up and we all, all the growers here are family. So I mean the only time something is watered by somebody else is if we get behind, or it's in the store. Then the retail girls take care of it out there. But I also am in charge of all of the seeding, my fiancé and I run the seeding room, and that just means we run the machine that puts the seeds in the trays and then responsible for labeling and recording and all that stuff. So I guess that would be one of my major roles, that and one of the growers. (Mike Evans)

This excerpt may suggest multiple succession models overlapping. Mike Evans could be describing multiple stand-by holdings, with individual brothers (the eventual successors) having responsibility for one or more greenhouses. However, Mike is responsible for all seeding, which fits with the idea of a partnership.

An interview was conducted with Mike's parents, the current growers. The following excerpt elaborates on the complex process of succession and suggests a mixture of succession types, perhaps a mixture of stand-by holdings and a partnership but where the partnership seems to extend to new areas, not to the parents' operation:

> We've been talking to the boys because, you know, as they're getting older they kind of want more money out of the enterprise, and we'll have to see whether we can keep going, whether…one of them started to take off and do mulch, Mike is doing the strawberries and then the vegetable stand. Whether one of them wants to start doing, you know, cuttings and growing ground cover, or you know, we've talked a little bit about trees or aquascape or any of those things…I said we're open to it, I'm not sure if I want to tackle them, but if they do…One of the wives is really interested in water gardening and water plants, so…we'll try it if they show an interest. They've got to learn too. (Natalie Evans)

Farmer Culture

According to Salamon, "an implicit assumption generally made is that US farmers typically evolve

management strategies to optimize financial returns" (1985, p. 325). She examined two farming communities in south central Illinois, whose culture, measured by ethnicity and religion, produced very different management principles and definitions of success. In effect, her research produces a typology of two ends of a possible continuum. On one end of the continuum sits the "yeoman" (a type associated with peasants or a precapitalist form of agriculture, emphasizing persistence and family and/or community legacy) and on the other end sits the "entrepreneur" (a type associated with a commercial focus "run unsentimentally for profit"). Salamon produces a typology of these two categories describing their contrasting goals, strategies, farming organization, family characteristics, and community structures (1985, p. 326). A cursory comparison of Salamon's (1985) types to the oral history data locates all of the farms in the yeoman type, but the match is not perfect. There are family, community, and farming organization differences. The differences do not fit the entrepreneur type, either. They lie somewhere between the two.

Salamon's (1985) "entrepreneur" seems to be the preferred model for farm decision-making among policy-makers and scholars, especially those influenced by neoclassical economics, including some of the authors of this paper. At the same time, those same authors point to a "strong rural farm culture" (Danes & Lee, 2004) to explain economic decisions that do not conform with the "entrepreneur." The "yeoman" is posited as one with values that contrast with the preferred model of farm decision-making. The oral history data suggests something different: the importance of social relations to economic decision-making. Salamon's entrepreneur conforms to an "undersocialized" view of people, while the yeoman conforms to an "oversocialized" view of people (Granovetter, 1985). Granovetter argues for the importance of "embeddedness," that is, "the [economic] behavior … to be analyzed are so constrained by ongoing social relations that to construe them as independent is a grievous misunderstanding" (p. 482). It does not appear to be an overwhelming adherence to "rural culture" that drives Barbara Norton; instead, it is the unfolding of the social relationships of her children that drive farm decision-making.

> And that's been a great success for us as parents, to let our children — we have six kids — and to let them, you know, Tom and I made that decision when our children were younger, that we were going to let them…discover the purpose and their desire, what they wanted to do in life, you know, and not push them to do so, to follow in our footsteps or follow our dream. And it's been great to see…three of our children and our daughter-in-law, you know, jump on board and they're having fun and they love what they do.

The oral history data confirm that succession is an important goal to most of the farmers, but the process in reaching that goal differs.

Succession is not just an important value of rural (yeoman) farming culture; it is important to the system that grows our food. In addition to the capital stocks bound up in machinery, buildings, and the land that are pushed into the next generation, so is the knowledge of local conditions and the peculiarities of the land. Many have noted the resilience of family farms, even in the face of forces that should eliminate them (Friedmann, 1978; Mann & Dickinson, 1978; Vandergeest, 1988). Some, like Lobley, Baker, and Whitehead (2010), see family farms as particularly important in the face of globalization and world markets to preserve local food security. Although they do not investigate it, they suggest that the process and type of successor may play a role in the ability of future family farms to retain their resiliency in the face of these challenges. Indeed, they suggest that the "farmer's boy" type has a:

> potential lack of wider farming knowledge, business and managerial skills, and the motivation required to drive the business forward in such uncertain times. Multiplied up, this may lead to farm businesses less well placed to adapt to and succeed in

> responding to the challenges of the future. (2010, p. 61)

Six successors in our study fit the "farmer's boy" type. However, some of the "farmer's boys" show good business and managerial skills and high motivation, perhaps more so than their fathers.

> About 1992, I tried to convince my dad to do a little more retail. He wasn't really keen on it, he gave me a little space. And then he went on vacation, and while he was on vacation I took down the first 100 feet [30 meters] of benches to make retail space while he was gone on vacation so when he got back he didn't have much choice, because it was done (laughter). That's about the only way I could get it done. (Gary Willow)

Willow's experience might be a common one for the farmer's boy. The farmer's boy may follow in the farmer's footsteps, providing little more than farm labor, but it need not be the farmer's shadow. In this case, the farmer's boy waited for this opportunity and diversified.

The very label, "farmer's boy," suggests a male successor, and there is no evidence in the oral histories of any "farmer's daughters" (a female successor who took over the farm after years of living on the farm and providing labor to the parents' or husband's business). However, farmer's boys do get married. Presumably all of the farmer's boys in this sample married, and for three of them, their wives clearly influence the farm operation. Much has been written of the traditional gendered division of labor on the farm (Brandth, 2002; Brandth & Haugen, 2010; Evans & Ilbery, 1996; Lobao & Meyer, 1995). The theme of gender from these oral histories is the focus of another paper, but it seems the wives in this sample bring good business and managerial skills, motivation, and creativity to the operation. For instance, Tom Norton would be a classified as a farmer's boy: "I grew up, grew up working the fields. Just kind of basically learned everything on hand." His wife, who is not from a farming family, followed a traditional gendered division of labor. In describing her history with the farm:

> Initially at the onset I wasn't really involved. We have six children. It's just been exciting. Again, it was great because that was during the wholesale phase, where we would come up here and hang out but I wasn't really involved working, which made it kind of nice because it — it made it *really* nice with our children and stuff, and so my involvement became more and more probably in the early nineties, late eighties or early nineties, again it afforded me the opportunity to be there and do my sole purpose in raising our children and that's been great, but it's been neat to see it change over the years, you know. (Barbara Norton)

She took care of the household and children while her husband, Tom, took care of the business. But, once the children were older, she became more involved in the business, and the changes referred to above may have been her responsibility. As she describes her current role in the business:

> Design, just with the container design, landscape design, that's been fun to develop that over the years and see that happen, which has all lent to our goal, is to become a destination garden center and a full-service garden center. So my role, you know, I plant containers, do a lot of the container design as well as landscape design. (Barbara Norton)

In another case, Carl Hutchens was a farmer's boy when he married Denise, who was working in a hospital. This is a variant on the traditional rural gendered division of labor, where the wife works off farm for supplemental income. However, she soon quit: 'he [Carl] says, "you're more valuable on the farm, you've got to come back and help me"' (Denise Hutchens).

It is likely that her help was more than just providing physical labor, as her grandparents were

farmers and she spent much of her time growing up working on their farm. The Hutchens' farm, too, has experienced a significant change during the tenure of the current owners, moving from growing for wholesalers to selling its produce retail. It seems this is a good example of the wife's influence on both the farm and the farmer's boy.

> Well, I guess the business started when Frank and I got married, but we were part of a family business. So we were married in '76, and at that time he just did grain farming, tomatoes, strawberries, and pickles. And 10 years later when we had four kids we were still looking for something that could be just ours, and we also needed a house because we lived with his grandmother, and it was getting very crowded. So the man across the street… decided he was going to have an auction and sell the place. So [Frank] came home and said "so what would you think about running a greenhouse operation?" And I said "if it comes with a house that's just fine." (Natalie Evans)

This quote suggests that both Natalie and her husband Frank were anxious to get out on their own, and when they did, they moved from growing grains, tomatoes, and other vegetables, to growing flowers. That this is a full partnership seems the case. In response to a question about their biggest accomplishment:

> Sure, working together! [laughter] Thirty-three years, there's a lot of people who say they wouldn't be able to do that. And I can't say that we haven't ever had a disagreement, and sometimes the employees feel like they're working for two different bosses. But, just that this was ours and that we started over, for me it's just bringing it this far. (Natalie Evans)

Hoping for and Expecting Succession

Although succession emerged as a theme in the analysis of the oral histories, planning did not, at least not a conscious, formal planning process involving estate planning and legal plans for succession such as that reflected in the booklet "Transferring the Family Farm" (New Jersey Farm Link Program, n.d.). Such a plan would reflect a highly rational act on the part of the farmer, but evidence suggests that such planning is not commonly practiced, despite the advantages to doing so (Pitts, Fowler, Kaplan, Nussbaum, & Becker, 2009). As cited above, a national survey of farmers who indicated they were retiring within five years found that only 34% had such a plan (Mishra & El-Osta, 2007). Given our small sample, it should not be surprising that none of the farmers indicated having a formal plan for succession. And we lack enough information about farm size, revenues, and family demographics to compare our sample to other research that has found such variation on having a plan varying by farmer's education, age of children, and size and value of farm.

One of the initial text codes of the oral histories was "future of the interviewee's business" which was later combined with other codes as the theme of succession. There is no evidence of any formal plan for succession from our interviews, although that does not mean such plans do not exist. However, formal succession planning is "complex, requiring family members to address issues such as authority, control, retirement, and death" (Pitts et al., 2009). It seems likely that if any of the individuals had entered into a process that might take a year or more to complete and at a significant cost, involving accountants, tax lawyers, and counselors, they would have mentioned it. Instead of formal planning, references to the future are better characterized as hopes and expectations. Perhaps this is an example of the replacement of "rule" with "strategy." Farmers use "strategies" to negotiate the "different symbolic domains" they face (Vandergeest, 1978, p. 24). Think of the yeoman farmer as embodying one symbolic domain and the entrepreneur another. Today's rules include inheritance and estate taxes, planning, corporate and farm business structures, authority, and ownership. In talking about the future of the farm after retirement, a "strategy" might sound like this: "I have four kids involved now, and I feel they would take over. They love, I believe they love everything they

do" (Tom Norton). A reluctance to retire and transfer control is commonly cited in research (Lobley et al., 2010; Bjuggren & Sund, 2001; Salamon, 1985). That is evident with farmers in our sample, too:

> I don't know if we ever will fully retire, but we're trying to give the boys more responsibility. One of them is married now and the other one is getting married, and trying to get their spouses and let them start feeling, you know, that it's part their business so we can hopefully wean ourselves out and they can — and they do have good ideas, and the last couple years have come up with some good ideas that have helped build the thing so hopefully within four or five years we can, you know, spend a little more time away from this place. I don't know if we ever will, like I say, but that's kind of what our plans are. (Natalie Evans)

Tim Hutchens, a young man and a possible eventual successor for his parents' farm business, is just starting out on his own farm. He has a young son, Joey. Nothing in the following quote suggests any formal planning, but it does reflect expectations and norms. He is conscious of them and he reflects on them:

> I mean, I'd love to see the farm passed down to the next generation, maybe it might be my nephews or nieces or whoever. But it doesn't have to be Joey, and I think it's important that he lives his life out to what he's called to do and go from there. But that's part of it, you know, my wife, we're thinking about purchasing this place and it's like, what do we do when we retire in 30 years or whatever. We'll get to cross that bridge when we get there, let's enjoy right now and just have fun. Because today may be the last day, so. There's part of, you know, being a guy and having a son, you know, you're like, oh, you know, you sort of want that, but I just really want him to really live out his life.

Discussion

Succession, more than any other single matter, may be the most important challenge facing the future of the small family farm. Past research makes the case that economic decisions for the farm are made with an eye to the future for purposes of succession (Inwood, 2008). Children (generally sons), consciously or not, are socialized to be a successor. These strategies can be seen in the hopes and expectations that characterize how parents talk about the future of their farms. These hopes and expectations reflect the conservative rural values that especially characterize the "yeoman" type farmer. At the same time, parents talk about their kids as following their own paths, doing what they want to do (with their fingers crossed that at least one will choose to stay on the farm). These latter values are more characteristic of the "entrepreneurial" type values, where lifestyle, tradition, and legacy give way to rational economic calculation (Salamon, 1985).

The oral histories with multigenerational members of the farm family shed additional light on the long process of succession, a richness that is typically lost in cross-sectional surveys about farm succession. Those studies tend to focus more on outcomes and less on process, and even less on how the farmers and their successors understand the process. The process appears less planned than reacted to, captured in such metaphors as "crossing that bridge when we come to it," or with references to God's plan or "farming is in their blood."

Growing up on the farm is the beginning of a path in which retiring, one day, from the farm is a good possibility. Research suggests that the earlier a successor is identified and significant authority delegated, the better for the successful transition of the farm (Lobley et al., 2010). And as these authors also noted, successors often have to wait a long time for the current owner to retire. The farms in this project reflect a similar pattern.

Early succession is more characteristic of the yeoman type of farming, whereas later retirement and succession geared more to personal desires is more characteristic of the entrepreneurial type of

farming (Salamon, 1985). All those interviewed who spoke to the issue indicated a hope that one of their children would one day take over, but they also expressed that it was important that the children make that choice. That males are so much more likely to be a successor than females suggests that perhaps males are more encouraged, directly, indirectly, or through larger societal norms about gender, to be successors.

The data also suggest that while the farmer's boy type of succession did appear to be the most common type of succession, as in other studies, these farmer's boys do not seem to be as unwilling to change and incorporate new business strategies as Lobley, Baker, and Whitehead (2010) fear. This is probably a good thing for the future of these family farms. The adaptations made at farms in this study with farmer's boy successors seem to follow a similar path. That path is from a wholesale operation to a more diversified operation that includes some retail, or to an entirely retail operation, but still growing for their own operation. In short, this means diversifying and vertically integrating their businesses. Wives on these farms oversee the retail portions of the business and appear to be full partners in the farm operation.

While the literature on succession suggests that rural values do not always emphasize narrow rational economic decision-making (Gatrell et al., 2009; Hennon & Hildenbrand, 2005), diversifying farming operations to include a retail market makes economic sense because in the case of the NW Ohio farmers, the city is getting closer: the population has grown over the last 25 years, and while land once was a plentiful resource for wholesale (industrial) farming operations, the encroaching metropolitan area makes land scarcer (and more expensive) but also makes customers more plentiful. Diversifying to include retailing "out the front door" what they are "growing out back" makes sense not just from the point of view of future succession (keeping the productive land in the family), but also is economically viable to meet the needs of the current family.

Conclusions

Scholars as well as policymakers, farm business advisors, and farmers categorize farmers into different types. In this paper we've relied on at least two such devices: Lobley, Baker, and Whitehead's (2010) categories of succession routes and successor types, and a typology of farmers proffered by Salamon (1985). In both cases, however, even though the categories and typology were derived empirically, our oral history data did not completely fit the succession categories or typologies.

Analyzing the oral history data was not unlike closely "listening" (Gatrell et al., 2010) to the farmer. Listening is the lesson for professionals who work with farmers and for farm and economic policy officials. It is easy to paint a statistical, academic (theoretical) picture of farmers. This research team has surveyed many of the farmers in the NW Ohio region and has interviewed them to find answers to research problems we posed. In those cases, we listened only to answers to questions we posed. The oral histories made us listen to them and to what they wanted to talk about. As familiar as we were with the farmers in this region and their challenges and their successes, the oral histories were both surprising and illuminating.

The farmers whose oral histories we analyzed in many ways fit the categories we later used to assess the data. But in important ways they did not. "Farmer's boys" innovated. They showed good business sense. Wives were crucial to the success of the farm operations, but not because of their off-farm income sources. Wives were active partners in the businesses, and it is hard to see them as anything but full partners who helped to diversify the farm in the face of a changing economy. Hence, it is important to include wives in any evaluation of the farm (such as for a loan) or for potential business deals, because these oral histories show how important the wives are to the success of these small farms and their associated businesses.

Those who provide services to farmers and policymakers should listen to farmers. Many solutions

that experts proffer do not necessarily solve the problems of the people they are supposed to help. Much of the interaction between the expert and the farmer becomes a matter of the expert trying to educate or convince the farmer about how the expert's solution is in the farmer's best interests. That approach does not necessarily respect the farmer, which may partly explain why many farmers are reluctant to seek the help of farm service and economic development professionals. Listening is an act of respect. Greater understanding of the individual farmer's goals, how he or she defines success, and what motivates and discourages him or her, will avoid typecasting them. 

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