

## **SERA49: Heirs' Property: Impacts at Family, Community, and Regional Levels**

### **Objectives**

1. Increase multidisciplinary and transdisciplinary collaborations and networking efforts among Extension and research professionals addressing heirs' property issues across the Southern Region.
2. Identify current and emerging issues specific to heirs' property in the Southern Region.
3. Assess federal, state, and local government policies related to heirs' property, including variations in county tax office practices, state property tax policies, and legal and policy options at the federal level necessary to meet the needs of heirs' property owners.
4. Support civil society organizations in serving the needs of the ultimate stakeholder, the owners of heirs' property.

### **Procedures and Activities**

Network Development: We will build on our highly successful networking capabilities to ensure collaboration between researchers, Extension professionals, leaders of civil society organizations, state and federal agency personnel, and others to expand and disseminate knowledge. SRDC manages several listservs that support networking. One listserv is broad and includes anyone who has an interest in heirs' property and is used to disseminate information widely. A second listserv supports a steering committee which meets monthly to exchange information and mobilize efforts to support initiatives such as the recently inaugurated "train-the-trainer" workshops. In addition, separate email groups support a set of working teams on research, Extension/outreach, and policy/legal issues related to heirs' property. Membership in these teams is open and the meetings provide valuable opportunities to share information. SRDC's role as a convener and facilitator has been instrumental in creating a vibrant community of scholars and practitioners. These efforts would continue and expand as a SERA, coupled with the organization of an annual comprehensive meeting and report.

Emerging and Current Issues Updates: We will monitor and evaluate legal and policy initiatives associated with heirs' property. Because many of our members are involved in policy initiatives nationally and at the state level across the country, these activities will be fostered through quarterly virtual meetings in which members share activities and relevant initiatives. When members identify policy developments without a member-affiliate, we will invite a stakeholder involved in the initiative to attend the quarterly meeting and present on their work. The primary purpose of these meetings is to share ideas and policy developments across jurisdictions, as well as to support problem solving through discussion and sharing of experiences. These meetings will equip members to educate their organizations and communities about opportunities for legal and policy solutions addressing heirs' property. The multiregional scope of the group will also enable members to identify differences in the way federal actions impact various regions of the United States and, through identifying common problems, to offer insights to federal policymakers concerning policy efficacy and improvement (e.g., heirs' property programs in the Farm Bill). Where support for a policy solution or more robust evaluation of a policy's efficacy is needed, these concerns will be translated to research questions that will be shared with the heirs' property research community at land-grant institutions as immediate research needs.

Educational Materials, Estate Planning, and Assistance: Through our networking activity, we will identify best practices and strategies for supporting owners of heirs' property and potential heirs' property owners through educational materials. The "train-the-trainer" workshops developed to increase capacity of Extension professionals to meet the needs of heirs' property owners can be seen as an outgrowth of the Extension/Outreach team's work. The team will continue to share information on funding and publication opportunities. Regular meetings frequently feature short presentations of recent work to the group, providing early access to data and findings by participants and valuable feedback to presenters.

### **Expected Outcomes and Impacts**

- Continuation and expansion a successful, collaborative, multidisciplinary, and multistakeholder activity centered on communication and cooperation between researchers, Extension professionals, and civil society organizations working directly with owners of heirs' property and those attempting to avoid heirs' property situations. Comments: Current and past activities include networking, organizing, training, and publishing. Networking through the SRDC and the SDFR Policy Research Center at Alcorn State University, 1890 and 1862 land-grant universities, Law Schools, and CBOs has produced funded proposals to investigate heirs' property at the local, regional, and national levels. Examples of key points of interest include the relationship of heirs' property and poverty/quality of life, and the impact of legislation (e.g., the UHPA) on partition actions in the various states that have adopted the UHPA. Through the organizing efforts of the SRDC, an educational package of training materials on heirs' property was developed and is being presented in various locations in the Southern Region over the next two years. The peer-reviewed Journal of Rural Social Sciences is in the process of final edits to an issue on heirs' property from the research, outreach, and legal perspectives. Moving forward under the proposed SERA, partners will continue to organize and communicate to advance collaboration on research, Extension, and integrated activities. Outcomes will include: a) expanded network membership to include more states, institutions, and individuals participating in activities; b) enhanced breadth and depth of participation in sub-group activities; c) increased collaboration to create co-authored funding proposals, research publications, and Extension materials; and d) connections with individuals and organizations in other regions to address heirs' property concerns with more diverse groups.
- Enhance integrating research and Extension programming around heirs' property. Comments: Current outcomes to date are an on-going process and will be enhanced through the proposed SERA integrating research and Extension programming. First, train-the-trainer sessions have increased participants' knowledge of various aspects of heirs' property, as well as the skills needed to address heirs' property issues. Second, at the same time, presenters have used the interactions in the workshop format to gain new information and modify the workshop materials accordingly. Third and finally, in terms of impacts or long-term gains, at the macro level, new and modified current policies and programs will be created, introduced, and adopted that focus on heirs' property at the national and regional levels. At the mid-level, a cadre of educational/Extension/outreach personnel will be created to address heirs' property at the local level. At the

micro/individual level there will be an increase in the number of heirs' property owners who take action to secure their land through titles, estate plans, and wills, and otherwise potential heirs' property owners will avoid such challenges. Moving forward under the proposed SERA, partners will collaborate on research and curricula development to: a) update materials to address regional nuances in heirs' property issues; b) create materials that are culturally appropriate to diverse racial, ethnic, language, and regional identities; and c) identify, and develop when needed, educational and technical materials that help heirs' property owners make productive use of their land through connection with agricultural, forestry, and tourism opportunity programs. These enhancements will be guided by a strategic applied research process which directs stakeholder needs and the creation of new materials overtime.

## **Educational Plan**

Through the network, various educational materials and programs have been developed including PowerPoint presentations, manuals, and reports. In addition, individual members of the network have worked with the SRDC and SDFR Policy Research Center, their own institutions, and directly with (or within) the USDA to provide information and operational guidance on heirs' property. Examples of these include workshops, translation of materials, curriculum development, policy development, informational briefs, and other products. The continuation and expansion of these efforts is a key rationale for the current SERA proposal.

Under the proposed SERA, heirs' property educational workshops will be delivered, both the train-the-trainer and community-level versions. The latter will be done through diverse state-level teams, led by 1890 land-grant partners in collaboration with 1862 and community-based organizations. An evaluation plan, including a workshop questionnaire and follow-up questionnaire concerning behaviors/actions taken after the training has been submitted to the Mississippi State University Institutional Review Board. The evaluation will be coordinated through the SRDC, with summary reports delivered back to the training teams and other relevant stakeholders. Additionally, SERA members will continue to provide and expand their offerings of educational presentations, workshops, and technical materials. This summary information will be reported annually as part of membership reports.

## **Organization/Governance**

Coordination of activities under the proposed project would be the responsibility of a Chair, Co-Chair, and a Secretary elected by the membership. The current structure of a Steering Committee and individual working groups addressing Research, Legal and Policy, and Extension, Education, and Outreach will continue. Each working group will be facilitated by two co-leads. In addition to monthly and quarterly virtual meetings, an annual meeting will be held to share successes, challenges, and make plans for the coming year. This meeting will also advance progress on the annual report to be submitted and available in the National Information Management and Support System (NIMSS).

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