

HEIRS' PROPERTY

EVALUATION TOOLKIT INSTRUCTIONS

Purpose of Evaluation:

Evaluation is a critical component for the program to estimate the impact of the resources. It allows us to answer the questions that focus on the value of the training. The evaluation feedback is important for the funders to receive in order to be accountable for the use of public resources. The summaries help to communicate the value of the public investment in the effort to not only the funders but also the program partners. The feedback is also valuable to individual educators aiding them in communicating the impact and/or value of their individual effort(s). The AgFTAP program leaders will aggregate the results to estimate the program's total impact in terms of producers trained as well as identifying some individual farmer & rancher success stories. In addition to a national summary, state level summaries and impacts will also be finalized. Therefore, please make sure that your efforts are included in the program's impact.

Please draw participants' attention to this statement at the top of each survey form. The one from the workshop survey is below and the 3-month survey is similar:

Please provide your feedback. The project involves research which includes completing this questionnaire and one after 3 months. For more information, contact Roseanne Scammahorn, r.scammahorn@msstate.edu or (662) 325-5885. Participation is voluntary, but your input is important. Individual responses will be confidential. Reports will be in summary form. IRB-23-285

Evaluation Tools:

- Post-Workshop Survey to be used at the close of training
- 3-Month Follow-up Survey – to be used after about three months. This can be done by electronic survey, paper survey, or by a follow-up visit or phone call
- QR codes that can be used for either of the above surveys if participants prefer to respond online.
- Outcomes and Impacts Chart – For use in RVS plan and reporting

Process:

Immediately after a workshop:

- At the close of each training session, please administer the post-workshop survey. Question 4 gives participants a place to note which of the three segments are covered. You may need to coach them on what to put there as they may not recognize how your material fit within those three modules (i.e. whether you taught only one or two of the modules or all three).

- You may administer paper copies and/or invite participants to fill out the survey online. You have both the paper copy and a QR code to the online survey in this packet.
- If you use paper copies, please mail or scan/email to SRDC using the contact information below.
- If some or all of your participants use the online survey, contact Roseanne with the date the workshop is held so we can pull the data.
- Once SRDC receives your data, we will synthesize these into a report that we will give back to you. These reports will match up to the RVS reporting system if you used the Outcomes and Impacts Chart to set them up.

3 Month Follow-Up:

- Using your sign-in sheet from the workshop, send the three-month follow-up survey to participants, asking them to complete and mail back OR you can use the QR Code for the 3 month follow up and send to them electronically if you have email addresses. You can also offer this survey face-to-face if you are meeting with the participants for continued support.
- Mail or scan/email hard copies to the address below. Notify Roseanne if you used the QR code.
- SRDC will provide a follow-up report for the 3-month follow-up impact. This will align with RVS reporting if you used the Outcomes and Impacts Chart.

Got questions? We're here to help:

Roseanne Scammahorn, Interim Director, Southern Rural Development Center
r.scammahorn@msstate.edu or 662-327-5885

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Understanding Heirs' Property at the Community Level Outcomes and Impacts Chart

OUTCOME	TOPIC AREA	TOPIC	PRODUCER ACTION	ESTIMATED NUMBER	WHEN WILL YOU VERIFY	HOW WILL YOU VERIFY
Understands how tax sales and partition sales can lead to land loss	Overview	History of Land Loss and Trust Issues	Understand		Immediately after program	Post-workshop Survey
Understands why heirs' property exists		Definitions	Understand		Immediately after program	Post-workshop Survey
Understands the potential impact of heirs' property		Economic Impact on Family & Community	Understand		Immediately after program	Post-workshop Survey
Understands how to identify heirs' property		Current Situation	Understand		Immediately after program	Post-workshop Survey
Look into county land records to see if participant's family has heirs' property.		Current Situation	Develop		Later	3 Month Follow-up Survey
Understands laws, policies and programs related to heirs' property.		Uniform Partition Act	Understand		Immediately after program	Post-workshop Survey
Understands how to prevent heirs' property when establishing a will	Prevention	Definitions and Legal Strategies	Understand		Immediately after program	Post-workshop Survey
Understands the basics of estate and succession planning		Estate Planning	Understand		Immediately after program	Post-workshop Survey
Takes steps to ensure participant has a will that prevents heirs' property problems in the future.		Estate Planning	Implement		Later	3 Month Follow-up Survey

Understanding Heirs' Property at the Community Level Outcomes and Impacts Chart

OUTCOME	TOPIC AREA	TOPIC	PRODUCER ACTION	ESTIMATED NUMBER	WHEN WILL YOU VERIFY	HOW WILL YOU VERIFY
Understands the importance of working with other family members	Resolution	Family Conversations	Understand		Immediately after program	Post-workshop Survey
Discusses heirs' property with family members		Family Conversations	Develop		Later	3 Month Follow-up Survey
Develops an heirs' property plan with family members and land/farm stakeholders		Family Conversations	Implement		Later	3 Month Follow-up Survey
Understands how to figure out who legally owns the property		Ancestry Resources/ Developing a Family Tree	Understand		Immediately after program	Post-workshop Survey
Identifies co-heirs of my family's land/farm		Ancestry Resources/ Developing a Family Tree	Develop		Later	3 Month Follow-up Survey
Creates a family tree with all relevant information (birth/death records/dates; wills, etc.)		Ancestry Resources/ Developing a Family Tree	Implement		Later	3 Month Follow-up Survey
Understands where to find resources to help with heirs' property.		Resources and Technical Assistance	Understand		Immediately after program	Post-workshop Survey
Develops a list of local resources for helping with heirs' property		Resources and Technical Assistance	Develop		Later	3 Month Follow-up Survey
Understands legal structures that can hold land owned as heirs' property owners		Legal strategies for securing land	Understand		Immediately after program	Post-workshop Survey
Understands steps to take to prepare to work with a professional (such as an attorney or estate planner)		Steps to Visiting an Attorney	Understand		Immediately after program	Post-workshop Survey
Puts together documents needed to visit a professional (such as an attorney or estate planner)		Steps to Visiting an Attorney	Develop		Later	3 Month Follow-up Survey
Seeks advice from a professional (such as an attorney or estate planner) about heirs' property issues		Steps to Visiting an Attorney	Implement		Later	3 Month Follow-up Survey

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1. **Date:** _____
2. **How was the workshop conducted (check all that apply)?** In-Person Virtual
3. **If in-person, what was the location?** City: _____ State: _____
4. **Please mark the heirs' property sections that were covered.**
 Overview Prevention Resolution

5. **Has what you know about heirs' property changed because of this workshop?** Mark the best options below by placing an X in the blank.

What I know about heirs' property has changed...	None	A Little	Some	A Lot
Before this workshop, how would you rate how much you knew about heirs' property?				
After this workshop, how would you rate how much you know about heirs' property?				

6. **How much did you learn about these topics discussed at the workshop?** Mark the best options below by placing an X in the blank.

Because of this workshop, I learned about...	None	A Little	Some	A Lot
Identifying heirs' property				
Why heirs' property exists				
Impacts of heirs' property				
How tax sales and partition sales can lead to land loss				
Laws, policies, and programs related to heirs' property				
Basics of estate and succession planning				
Preventing heirs' property when establishing a will				
Figuring out who owns a particular parcel of land				
Legal structures that can hold land owned as heirs' property				
The importance of working with other family members				
Steps families can take to address heirs' property				
Preparing to work with an attorney				

7. **Please place an X to show how much you agree or disagree with these statements.**

Based on this workshop...	Strongly Disagree	Disagree	Agree	Strongly Agree
I know where to find resources to help with heirs' property.				
I will use this information to help my family address heirs' property issues.				

8. Please place an X for the responses that apply to you.

As a result of participating in this workshop, I will...	Yes	No	Already Complete	Not Applicable
Look into county land records to see if my family has heirs' property				
Create a family tree				
Identify co-heirs of my family's land/farm				
Discuss heirs' property with family members				
Develop a list of local resources to help with heirs' property issues				
Put together documents needed to visit a professional (such as an attorney or estate planner) about heirs' property issues				
Seek advice from a professional (such as an attorney or estate planner) about heirs' property issues				
Develop an heirs' property plan with family members and land/farm stakeholders				
Take steps to ensure that I have a will that prevents heirs' property problems in the future				

9. What was most helpful about the workshop and materials?

10. What would make the workshop and materials even better?

11. What else do you need to help your family or community with heirs' property?

12. About you:

What is your connection to heirs' property? (Select all that apply)

- My family is currently dealing with an heirs' property situation.
 I am trying to help my family avoid heirs' property issues in the future.
 I am generally interested in heirs' property issues to help my family and community.

What is your age?

18 to 24 25 to 34 35 to 44 45 to 54 55 to 64 65 or older

How would you describe your sex?

Female Male Not listed, please specify: _____

What is your race or ethnicity? (Select all that apply)

- American Indian or Alaska Native Hispanic, Latino, or Spanish Origin
 Asian White or Caucasian
 Black or African American Not listed, please specify:
 Native Hawaiian or Other Pacific Islander _____

Thank you for sharing your thoughts.

**Understanding Heirs' Property at the Community Level Workshop
3-Month Check-In Evaluation**

Please provide updates on your heirs' property experience since the time of the workshop. The project involves research which includes completing this survey. For more information, contact Roseanne Scammahorn, r.scammahorn@msstate.edu or (662) 325-5885. Participation is voluntary, but your input is important. Individual responses will be confidential. Reports will be in summary form.

1. **Today's date:** _____
2. **What City/Town and State/Territory did you participate in the "Understanding Heirs' Property at the Community Level" workshop through?**
City: _____ State: _____
3. **Thinking about all sections of the heirs' property workshop you participated in, were they held in-person, virtually, or a combination of the two?**
____ In-Person ____ Virtually ____ Combination of In-Person and Virtual Sections
4. **What have you done since participating in the heirs' property workshop?** Place an X for the responses most applicable to you.

As a result of participating in this workshop, I...	Yes	No	Completed before training	Not Applicable
Looked into county land records to see if my family has heirs' property				
Created a family tree				
Identified co-heirs of my family's land/farm				
Discussed heirs' property with family members				
Developed a list of local resources to help with heirs' property issues				
Put together documents needed to visit a professional (such as an attorney or estate planner) about heirs' property issues				
Sought advice from a professional (such as an attorney or estate planner) about heirs' property issues				
Developed an heirs' property plan with family members and land/farm stakeholders				
Took steps to ensure that I have a will that prevents heirs' property problems in the future				

5. **Are there any other steps you have taken around heirs' property because of what you learned from the workshop? If yes, please explain.**

6. **What else do you need to help your family or community with heirs' property?**

Thank you for sharing your thoughts.