

Planning for Growth and Open Space Conservation

This webinar series is sponsored by:
USDA Forest Service
State and Private Forestry - Cooperative Forestry

Organized by
Susan Stein, Sara Comas, Susan Guynn (Clemson University)
and the
Forest Service National Open Space Conservation Group

April 16, 2014

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Streamed Through
the Computer



This webinar is being recorded

Learn About the Series

Listen to past webinars!

Listen to our past webinars:

- ▶ [Session #9](#): Private land conservation programs from the Farm Bill: Natural Resources Conservation Service, Farm Service Agency, and US Forest Service.
- ▶ [Session #8](#): Landscape Conservation Initiatives: US Fish and Wildlife Service, Bureau of Land Management, Department of Defense, Natural Resources Conservation Service
- ▶ [Session #7](#): Science to inform Open Space Conservation: Land use changes, forest fragmentation, and the Wildland-Urban Interface
- ▶ [Session #6](#): Facilitating Large Landscape Conservation Efforts: Working effectively across boundaries in the Northeast and Crown of the Continent
- ▶ [Session #5](#): Local and Regional Land Trusts: Essential partners and the tools they provide
- ▶ [Session #4](#): The Forest Service Toolbox: Conservation easement and land acquisition programs
- ▶ [Session #3](#): Green Infrastructure Planning: Connecting partners and greenspaces
- ▶ [Session #2](#): YES YOU CAN! Participating in Growth Planning Beyond the Green Line
- ▶ [Session #1](#): National Forest Management in the Face of Housing Growth

Learn about future topics!

Future Topics:

Please [register](#) in advance if you would like to attend these presentations.

- ▶ [Session #11](#): An All Lands Approach to Ecosystem Services for Water

Submit feedback about the series!

Please submit your feedback [here](#)

Learn About the Series

Click on the session titles for more info on recordings, slide presentations, and featured resources



Listen to our past webinars:

▾ [Session #13: City and County Open Space Programs](#)

This program presents growth and open space conservation planning for cities and counties. Speakers will present the Trust for Public Land's Conservation Almanac and LandVote resources that are available online for researching conservation activities, and public funding for land conservation. We will also learn about open space conservation planning processes, ordinances, funding mechanisms, and partnerships employed in Missoula, Montana, and Baltimore County, Maryland.

- **Mary Bruce Alford Trust for Public Land**
- **Jackie Corday City of Missoula, Montana**
- **Don Outen Baltimore County, Maryland**

[Link to video presentation](#)

[Link to PDF Presentation](#)

[Link to resources from this webinar](#)

▸ [Session #12: Greening Grey Infrastructure: Federal Highway Administration's Eco-Logical Approach and Case Studies from National Forests in Ohio and Washington](#)

▸ [Session #11: An All Lands Approach to Ecosystem Services for Water](#)

▸ [Session #10: Tools for Conservation Planning](#)

Webinar Resources and Tools



USDA United States Department of Agriculture
Forest Service

Open Space Conservation

Forest Service Home | About the Forest Service

Browse by Subject You are here: [Home](#) | Resources

- ▶ National Strategy
- ▶ Loss of Open Space
- ▶ Success Stories
- ▶ What the Forest Service can do!
- ▶ **Resources & Tools**
- ▶ Cooperating Across Boundaries
- ▶ Forests On The Edge
- ▶ Publications

Resources and Tools

The resources and tools shared below correspond with topics from our [Planning for Growth and Open Space Conservation webinar series](#).

Want to add tools to this list? Contact [Rick Pringle](#) with a link

Legal Authorities for Forest Service Engagement in Open Space

- ▶ [Forest Service Handbook 1509 Grants and Agreements](#)
- ▶ [Partnership Guide](#)
- ▶ [Partnership Resource Center](#)
- ▶ [Principles of Ethical Conduct for Government Officers and Employees](#)

Find relevant resources for each webinar session here!
If you have relevant resources to share please send them to us!

Session #24 – Integrated Water Strategies at the Urban Fringe

Wednesday, May 14th at 2:00 pm Eastern

- **Joe Berg** *BioHabitats Inc.*
- **Keith Underwood** *Underwood and Associates*
- **John McLaughlin** *New York Department of Environmental Protection*



Future Webinar Topics

- Planning for forests and water conservation
- Design and the Urban Fringe
- More projects being planned for 2014

Session #23: Intergenerational Land Transfer



Brett Butler
US Forest Service
Forest Inventory
and Analysis



Paul Catanzaro
University of
Massachusetts -
Amherst

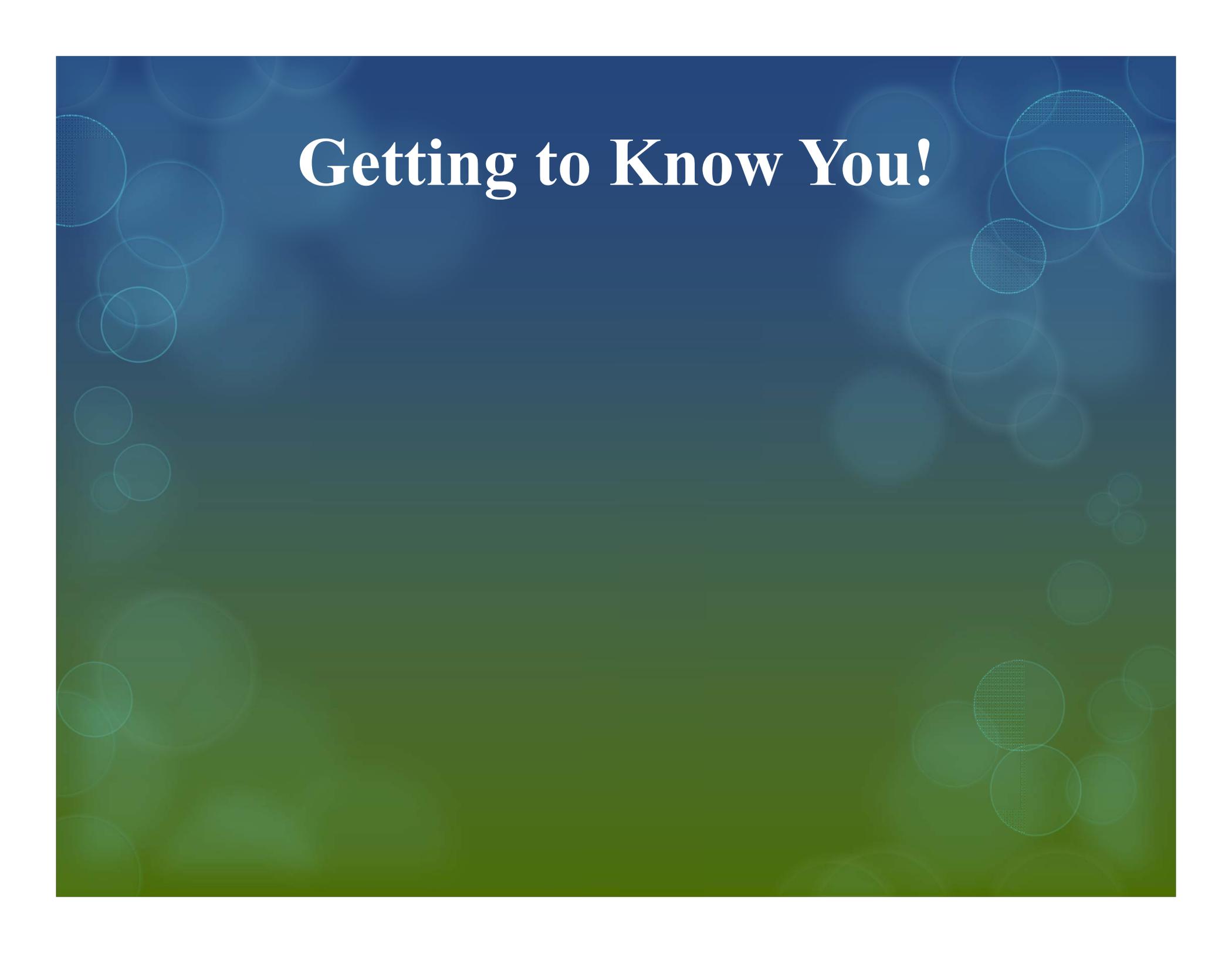


**Allen and Ginny
Nipper**
Landowner Legacy
Communication

Logistics – Q&A

- **Continuing Education Credits**
 - Attend entire presentation
- **Questions for speakers – chat pod**
- **Technical difficulties – chat pod or email Susan Guynn: SGUYNN@clemson.edu**

Getting to Know You!

The background of the slide features a vertical gradient from dark blue at the top to a vibrant green at the bottom. Scattered across this gradient are numerous overlapping circles of varying sizes and opacities. Some circles are solid, while others are semi-transparent, creating a layered, bokeh-like effect. The overall aesthetic is clean and modern.



Brett Butler
US Forest Service
Northern Research Station
Forest Inventory and Analysis

America's Family Forest Owners

Preliminary Results from the U.S. Forest Service, National Woodland Owner Survey

Brett J. Butler
U.S. Forest Service
April 16, 2014

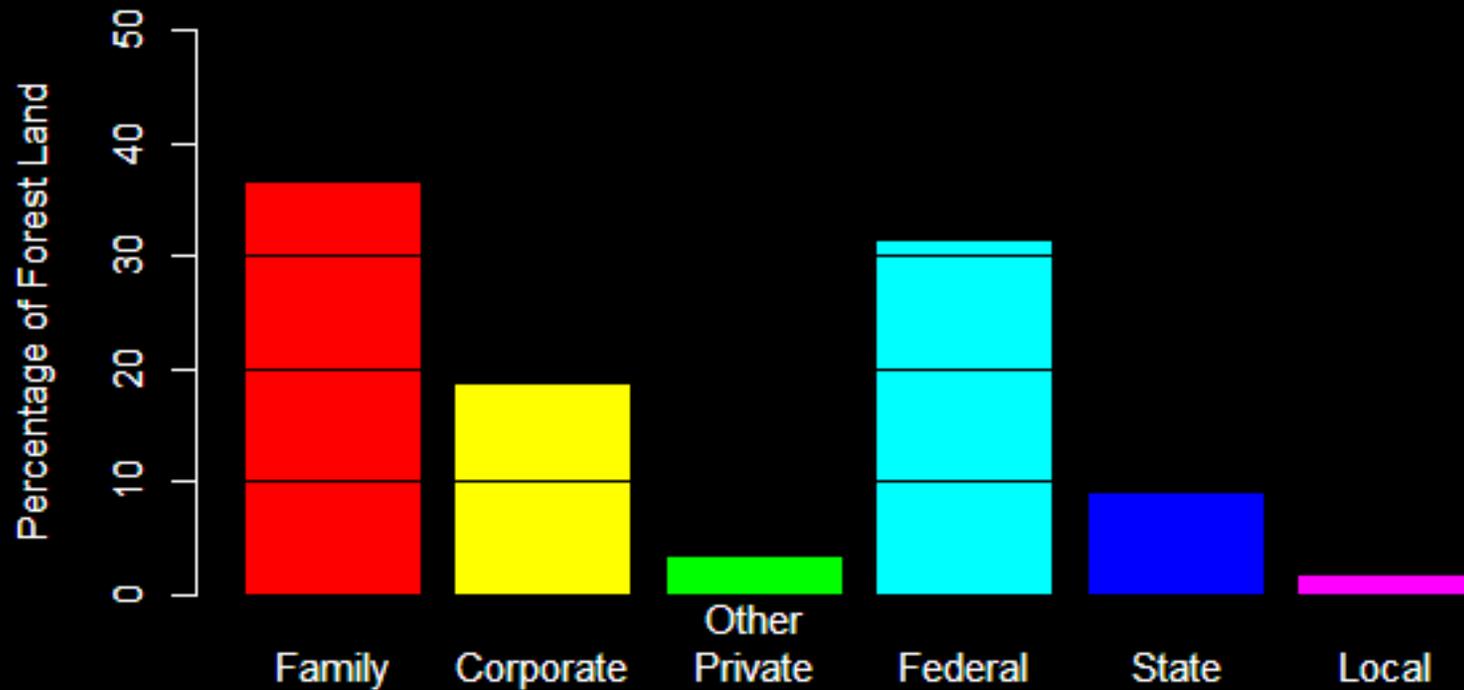
Conclusions

- Family forest owners rule!
- Size matters
- Beauty, wildlife, legacy, nature, privacy
- To manage or not to manage?
- A bunch of old guys
- Family forest owners don't own forests

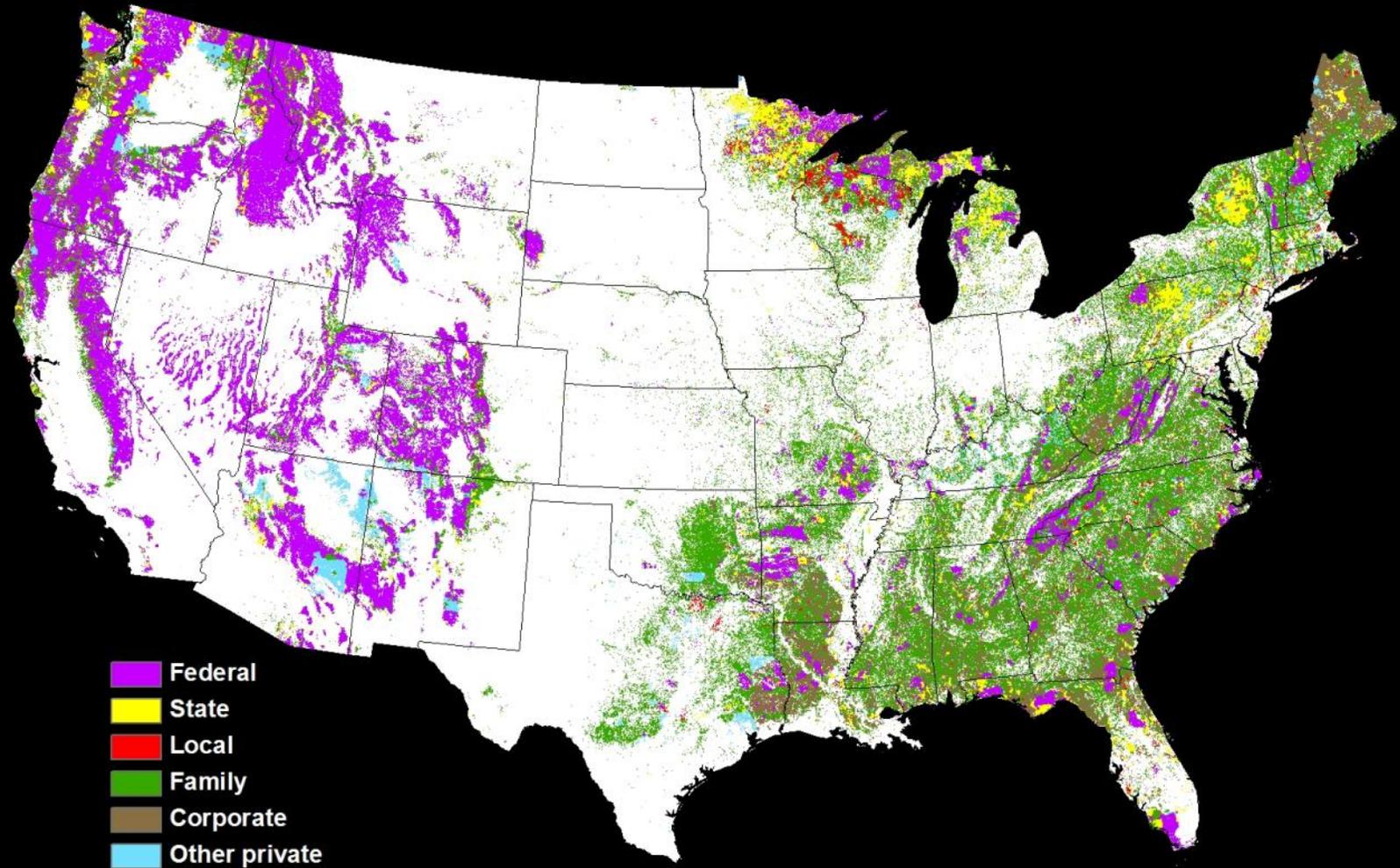
Family Forest
Owners Rule!

Forest Land by Ownership Class

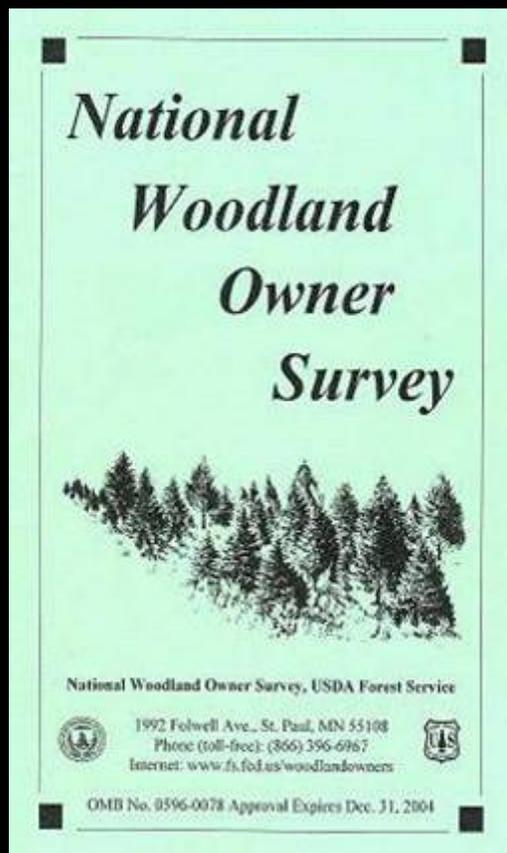
US, 2011-2013



Forest Ownership, US 2011-2013



National Woodland Owner Survey



Conducted by the U.S. Forest Service, Forest Inventory and Analysis program

To better understand:

- Who the landowners are
- Why they own land
- How they have used it
- How they intend to use it

Family Forests by the Numbers

Family Forests (10+ ac), US, 2011-2013

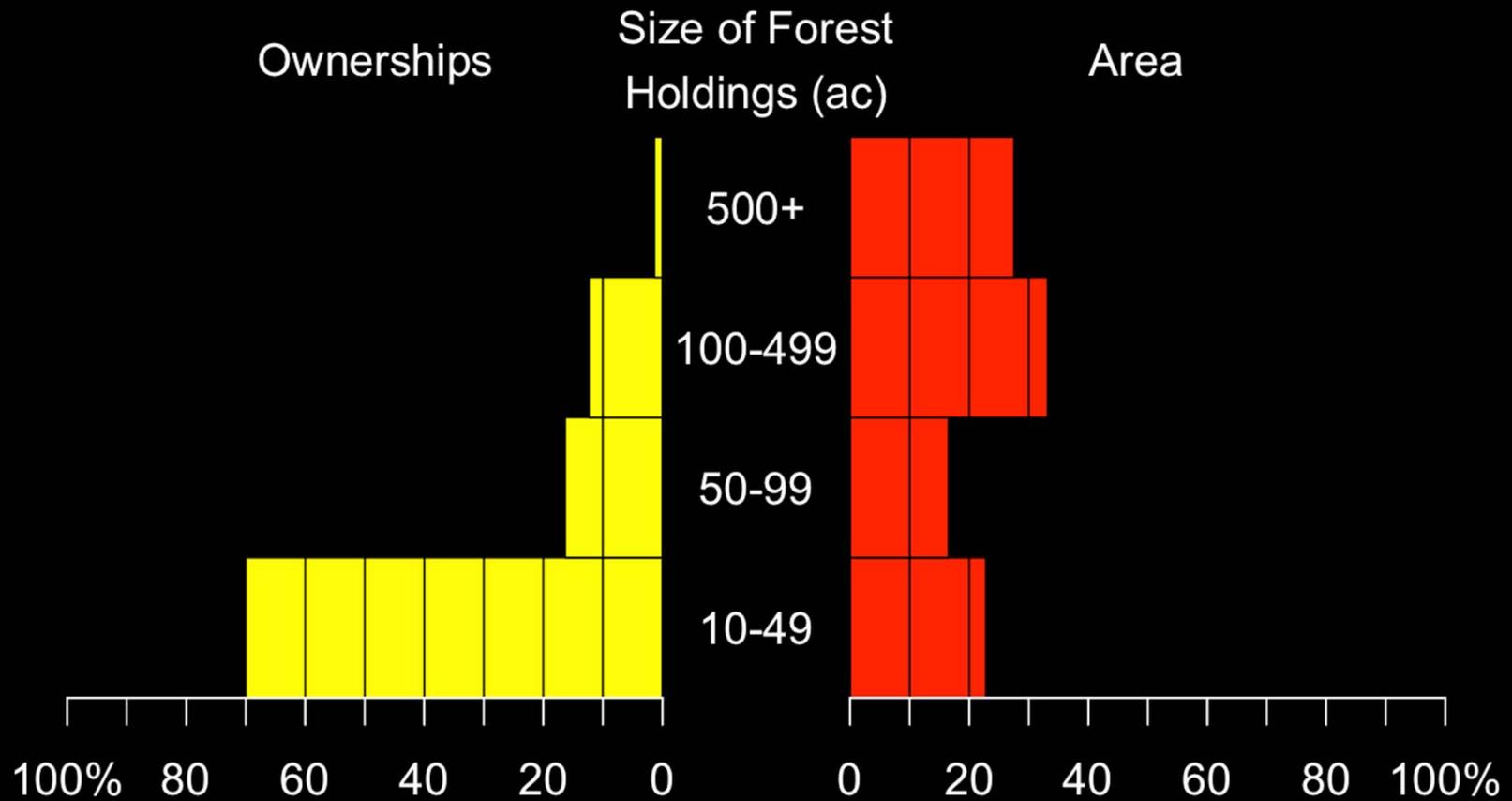
- Acres: 268,633,000
- Ownerships: 4,077,000
- Average holding size: 66 acres
- Owners: 9,728,000

PRELIMINARY RESULTS

Size Matters

Size of Forest Holdings

Family Forests (10+ ac), US, 2011-2013



PRELIMINARY RESULTS

Beauty

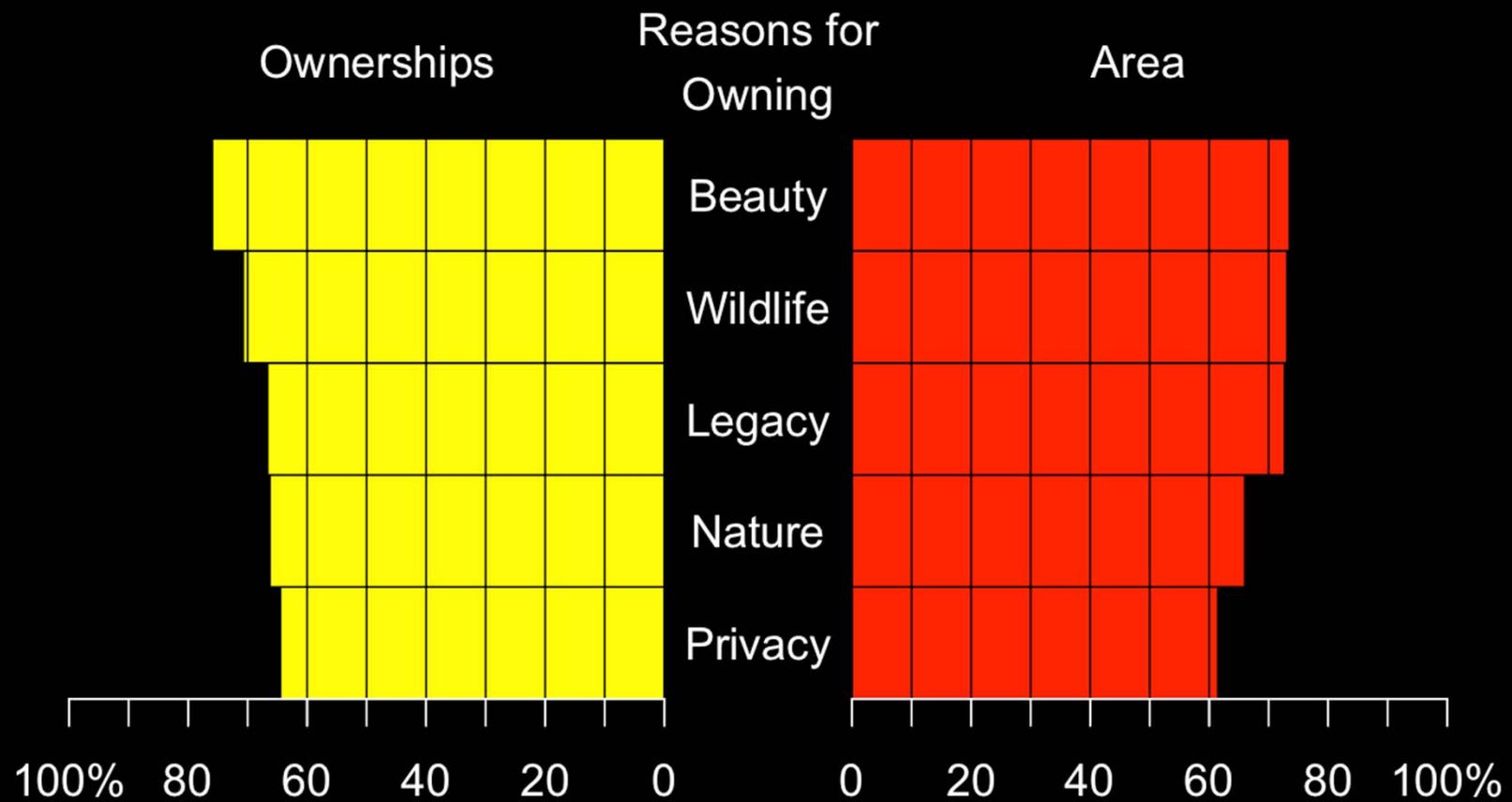
Wildlife

Legacy

Nature

Privacy

Top Five Reasons for Owning Family Forests (10+ ac), US, 2011-2013



PRELIMINARY RESULTS

Part of Home/Farm

Family Forests (10+ ac), US, 2011-2013

- Part of Home
 - 63% of ownerships
 - 57% of acres
- Part of Farm
 - 33% of ownerships
 - 46% of acres

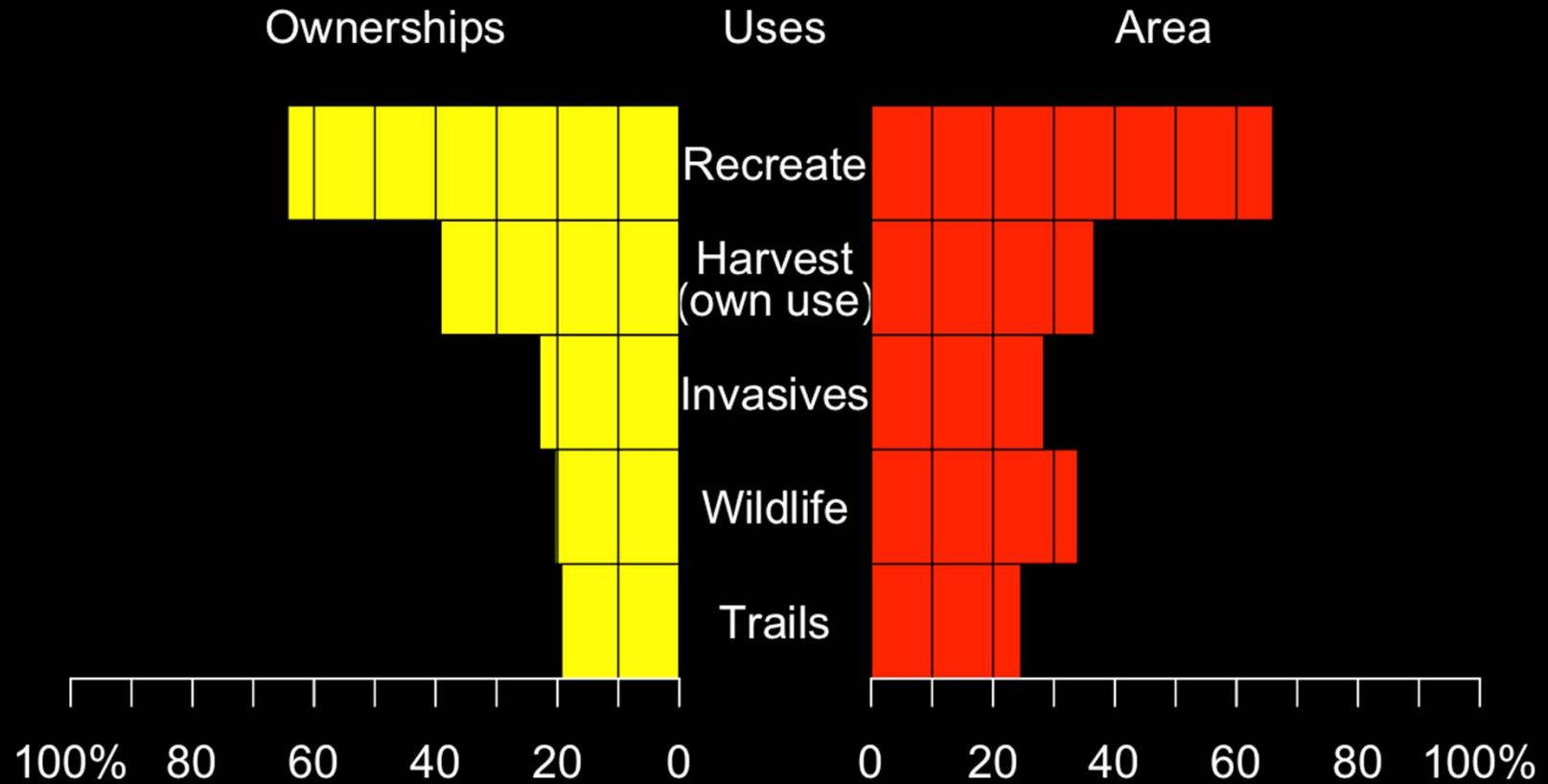


PRELIMINARY RESULTS

To Manage or
Not to Manage?

Uses

Family Forests (10+ ac), US, 2011-2013



PRELIMINARY RESULTS

Management

Family Forests (10+ ac), US, 2011-2013



PRELIMINARY RESULTS

They are a Bunch
of Old Guys

Owner Age

Family Forests (10+ ac), US, 2011-2013



PRELIMINARY RESULTS

How do we
reach them?

a new outreach approach

[Why targeted marketing makes a difference]

new landowner research

[Profiles of the main types of landowners]

make your new plan

[Step-by-step tool to make & save your plan]

SEARCH

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[contact us](#) • [privacy policy](#)

Welcome to TELE

This web site is designed to help natural resource professionals engage more family forest owners in a meaningful conversation about their woods.

Most natural resource professionals know that one-on-one conversations with landowners are the best way to influence them. This is because we intuitively tailor our conversations to the knowledge level, values and style of our conversation partners. We mirror their language, reflect their values, and try to build on the common ground we share with them.

This site will help you do the same thing on a larger scale. It offers data and techniques to help you target your outreach activities to specific types of landowners. This will allow you to speak more meaningfully and persuasively to landowners, thus improving the outcomes of your outreach and yielding results like these:

- Of 20 people at your presentation, 15 follow up to get more information.
- You have to close outreach for the forest stewardship program three weeks early because you've already enrolled as many landowners as you can serve.
- Your latest ad campaign elicits requests for material from 1,000 landowners, most of whom have never contacted your organization before.

This resource has been developed by the Sustaining Family Forests Initiative (SFFI) using data from the National Woodland Owner Survey. SFFI is a collaborative of federal and state forestry and conservation agencies, businesses, and nonprofit organizations that realize private landowners play a crucial role in sustaining and nurturing our natural resources. It is coordinated by the [Yale School of Forestry and Environmental Studies](#) and the [U.S. Forest Service's Family Forest Research Center](#).

A New Outreach Approach

Learn how Targeted Marketing can help you make a breakthrough in your outreach efforts.

- » [Why Targeted Marketing?](#)
- » [How to Rev Up Your Outreach](#)
- » [Targeted Marketing in Action](#)

New Landowner Research

Find out about 4 types of woodland owners and how you can reach out to them most effectively.

- » [4 Types of Landowners](#)
- » [The Prime Prospect Analysis](#)
- » [Landowners in Your Area](#)

Make a New Plan

Put this knowledge and information to work for you. Use our planning tool to develop your communication plan.

[Start Your Plan Now »](#)

Conclusions

- Family forest owners rule!
- Size matters
- Beauty, wildlife, legacy, nature, privacy
- To manage or not to manage?
- A bunch of old guys
- Family forest owners don't own forests

Additional Information

- Brett Butler
bbutler01@fs.fed.us
- National Woodland Owner Survey
www.fia.fs.fed.us/nwos
- Family Forest Research Center
www.familyforestresearchcenter.org
- Tools for Engaging Landowners Effectively
www.engaginglandowners.org



Paul Catanzaro

**University of Massachusetts – Amherst
Department of Environmental Conservation**

Conservation-Based Estate Planning



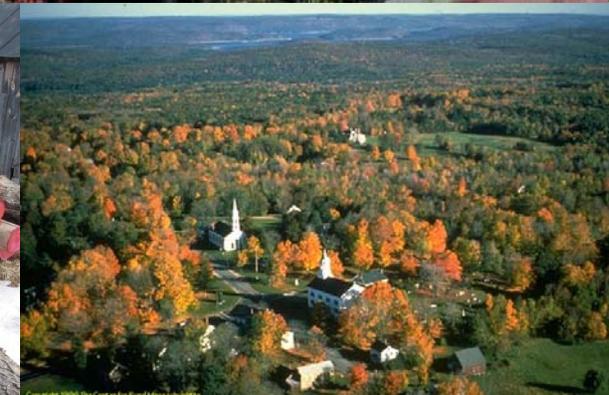
Paul Catanzaro
Extension Assistant Professor
UMass Amherst

Forest Emergency

BREAK GLASS
← ● →
PRESS HERE



What's at Stake?



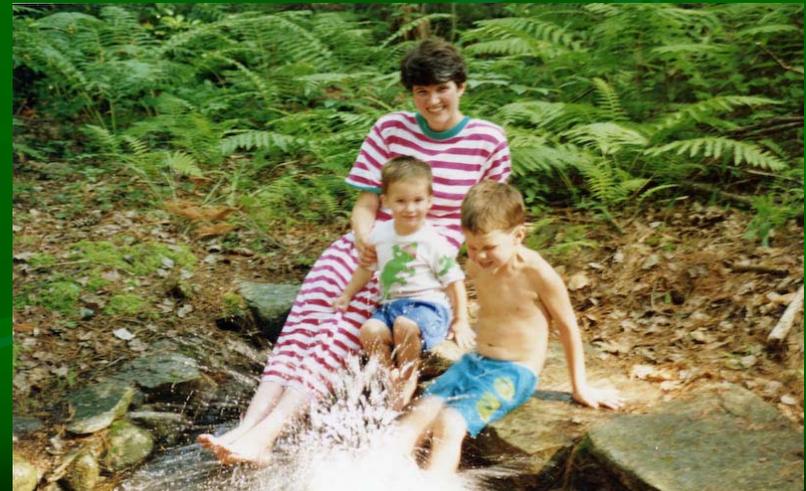
Copyright 2008 The Center for Rural Massachusetts

What's at Stake?



Land as an Asset

- Land is likely one of a landowner's most valuable assets
- However, land is not like other assets, it also has personal value.



The Challenge

- Ensuring that both financial and personal needs are being met.



Land is a flexible asset

- Land lends itself to **creative solutions** for gaining both financial and personal values from it
- There is no one “right” solution for all landowners

Estate Plan

- An 'Estate Plan' is not a single, all-encompassing document
- A **process** that includes the development of a combination of **documents** (e.g., will) and **tools** (e.g. conservation easement) that achieve your personal and financial goals when implemented together.

Conservation Based Estate Planning (CBEP)

- Those elements of estate planning that deal directly with keeping some or all of the land in its natural state/undeveloped.
- Many know their options to sub-divide and develop land.
- Not many know about their options to keeping at least some of their land undeveloped.

Primary Goal of CBEP

“Keep the Plates Spinning”

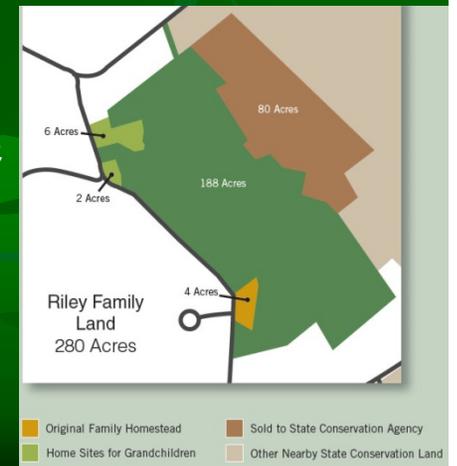
- Try to get as much undeveloped land passed to a new owner in as big of an ownership possible.
- In other words, reduce conversion & reduce parcelization.



Range of CBEP

There's no one right answer!

- Discussing wishes for land with family
- Join a current use program
- Formalizing wishes in a will
- Changing the ownership (e.g., LLC, Trust)
- Conservation Easement donation/sale
- Land donation/sale



Outreach Work

Lessons from the Field

- “Your Land, Your Legacy” publication
- 1 & 2-evening events
- Web-based tools/info.
- Peer networks
- Engage professionals
- Facilitation

Collaborators

Extension

- Jay Rasku
- Wendy Ferris

Research

- Marla Markowski-Lindsay
- Tyler Van Fleet

Be patient

Forests develop over years. Families decide over years!

- Decisions are infrequent
- Estate Planning is complex
- Landowners are in various stages in the process
- Outreach needs to be flexible



Challenges

Barrier/Barrier Grouping	Mean Percentage of Respondents
Family-related barrier	48.0%
Barrier related to being overwhelmed	43.1%
"Cost or expense of planning process"	42.2%
Barrier related to advice issues	30.4%
"I am not ready to act" ^a	19.6%

Outreach Impacts

- 70% of those surveyed moved forward in some way (Catanzaro et. al. 2013).
- Oregon/NY found 71% surveyed moved forward in some way (Withrow-Robinson et. al. 2013).
- This is an issue we can influence!

Multiple Generations

- Almost 70% of families reported 2 or more generations involved
- Average 2.1
- Range 1 – 4



Women in the Process

- Almost half of the survey responses were from women.
- Ownerships as reported in the (preliminary) NWOS:
 - Owner 1: 79% male, 21% female
 - Owner 2: 17% male, 83% female



First Responders

Natural Resource Professionals Play a Critical Role!

- Land Trust (33.1%)
- Foresters (32.8%)



Concluding Thoughts

- Land is a flexible asset > number of tools
- Landowners often look to Natural resource professionals for help
- You don't need to be an "expert" on these tools to be help!
- Connect landowners to resources, other professionals, and landowners with experience.
- **The time to start is now!!!**

Thank You

Paul Catanzaro

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www.MassWoods.net

Your land, Your legacy



Deciding the Future of Your Land
to Meet the Needs of You and Your Family



Allen and Ginny Nipper
Private Landowners
Landowner Legacy Communication

Communication in Intergenerational Transfer

developing family legacies

Ginny and Allen Nipper
Landowner Legacy Communication



PASS IT FORWARD

Outline

- Experiences
- Plans
- Lessons learned
- Future
- Program
- All address concern over forestland:
 - conversion
 - parcelization
 - intergenerational transfer

Our Experiences

- **Non-industrial, private landowners**
- **We are Tree Farmers!**
 - grow / manage trees as a crop**
 - five tracts; about 400 acres**
 - two counties in southwest AR**
 - two parishes in central & north LA**
 - smaller tracts; 40 to 160 acres**
 - plantation / naturally regenerated**

Our Experiences

- **We are Tree Farmers (continued)**
all in American Tree Farm System
tracts “ages” – 111 years to 6 years
inherited / purchased / combination
- **Not foresters**
- **Are experts at our own experiences;**
focus of this part of the webinar
basis for Landowner Legacy
Communication[©] program

Our Experiences

- Intergenerational transfer began almost 20 years ago and continues
- ATFS training session 8 years ago; one portion on family meetings
- Found our passion for our family
- Developed a passion to help others
- Now know < 50% of families owning forestland have had a meeting

Our Experiences

- **Allen's family**

4 siblings; Allen is oldest

father planned lot of details

discussions: disjointed due to

location, interest, other challenges

limited to no written records

most passed on to single owners

with exception of one tract

family mtgs not important to other 3

Our Experiences

- **Ginny's family**

**4 siblings; Ginny is youngest
father planned little for succession
discussions: limited with brothers,
sisters were not included**

no written records

**all passed to joint owners; except 2
tracts deeded before his death**

family mtgs not pondered by other 3

Our Experiences

- Ended up with timber land owned individually or in partnership
land was valued by new owners for different reasons
partnerships = Ginny & Allen doing majority of the work
attempted to divide interest and / or establish entity to manage for benefit of everyone

Our Experiences

- **Ginny & Allen's family**
 - 3 adult children; 26 to 15 years old**
 - in beginning**
 - wanted to leave children**
 - prepared**
 - experienced**
 - engaged**
 - with an emotional legacy**
 - detailed written records available**

Our Experiences

- **Ginny & Allen's family (continued)**
family meetings twice a year
assigned responsibilities based on
interest and abilities
report at family meeting
their individual responsibilities
as well as general topics
only blood relatives have a vote; but
everyone participates

Our Experiences

- **Ginny & Allen's family (continued)**
 - support membership in forestry associations / groups**
 - promote participation in educational meetings / trainings**
 - everyone shares in:**

plans	work
tours	records
financials	profits

Our Plans

- **Daughter**

- **weather**

- **data backup**

- **GIS management**

- **private landowner records**

- **Oldest son**



Our Plans

- **Daughter**



- **Oldest son**

- **environmental**
- **soil / water samples**
- **teacher education**
- **webpages**
- **blog**

Our Plans

- **Youngest son**
 - **property lines**
 - **growth plots**
 - **hunting leases**
 - **acquisitions**
 - **courthouse records**



Our Plans

- **Youngest son**
- **Relinquished & reassigned areas**
 - **economic growth reports**
 - **tax issues**
 - **Landowner Legacy Communication program**

Lessons Learned

- **Now recognize**
intergenerational transfer follows
pattern of ancestors
takes time, effort, patience but
mainly communication to change
that pattern
may be in bits and pieces
can only do what you can do
don't give up

Lessons Learned

- Over communicate
- Begin as early as possible
- Involve in all aspects
- Specific responsibilities
- Ground rules
- Regular meetings
- Everyone has to listen, really listen
- Records / meeting minutes
- Family values / stories
- Evaluate meeting success

Our Future

- **Communicate**
- **Educate**
- **Involve**
- **Have fun**
- **Share**
- **Something to survive Ginny & Allen**
 - groom successor**
 - refine / cultivate business entity**
 - continue the LLC program**

Landowner Legacy Communication[©] Program

- **Family communication facilitation**
 - presentations**
 - workshops**
 - business communication coaching**
- **Land / timber record facilitation**
- **Web based information**
 - www.LandownerLegacy.com**
 - Twitter: @LandownerLegacy**

- **Contact information**

Ginny and Allen Nipper

Landowner Legacy Communication

318-773-7158

ginny@landownerlegacy.com

allen@landownerlegacy.com





PASS IT FORWARD

Questions and Answers

Ask questions through the chat pod

Foresters: Type your FULL NAME and Licensing Number or SAF Membership/CF Number in the chat pod in order to receive CFE credit.

General Audience: If you would like a general certificate of attendance, please download the file in the “Files Pod.”

****You must attend the entire 1.5 hr webinar to receive credit.****

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Or Contact

Susan Stein – **sstein@fs.fed.us**

Sara Comas - **scomas@fs.fed.us**