



Family Forest Stewardship:

Sustaining Our Commitment, Advancing the Agenda

September 12-13, 2007

A Conference of the Vital Forests/Vital Communities Initiative
Saint John's University, Collegeville, Minnesota

Official Conference Proceedings

Background

On September 13th, nearly 100 family forestland owners, forestry professionals, policy makers, and other forest supporters came together to revisit and hold each other accountable to family forest stewardship commitments. On May 25, 2006, participants in the previous conference had achieved consensus on a strategic vision and action plan to ***increase the number of acres of family forestland with Forest Stewardship Management Plans from 1.3 million today to 2.3 million by 2015¹***.

Between May 2006 and September 2007, significant progress was made on the action plan. Minnesota now has more than 40 certified loggers, a new group of certified landowners in Aitkin County, and a new website to serve landowners, including a discussion board with well over 5,500 hits and more than 50 discussion topics. The 2007 legislative session included efforts to modify the Sustainable Forestry Incentives Act (SFIA) and the *ad valorem* property tax system. To date, more than 25 organizations in Minnesota have signed-on and endorsed the Next Million Acre Goal.

The September 2007 conference built on the energies and commitments of many organizations. The agenda included a tour of the Saint John's Arboretum with the Manager, Tom Kroll. An additional highlight was the presentation of graduation certificates to the eleven members of the Minnesota Forestry Association that participated in the Woodland Leadership Institute in 2007.

Both conferences were sponsored by the Blandin Foundation's Vital Forest/Vital Communities (VF/VC) Initiative, part of the Foundation's commitment to fostering economically vital communities. VF/VC aims to increase the competitiveness of Minnesota's forest-based industry, improve the quality and sustainability of our forest resource and improve the economic vitality of Minnesota's forest dependent

¹ The complete 2006 Conference Proceedings are available at the Foundation's website.

communities. The Initiative is aligned with the Foundation’s broader mission – to strengthen rural Minnesota communities, especially the Grand Rapids area - because the health of the forests and forest-based businesses directly affects rural communities. The conferences’ focus on family forest stewardship serves the VF/VC Initiative’s objective to increase the number of acres of family forestland being actively and sustainably managed.

2007 Conference Proceedings

These proceedings summarize the keynote presentations and outcomes of the *Family Forest Stewardship* conference held September 12-13, 2007.

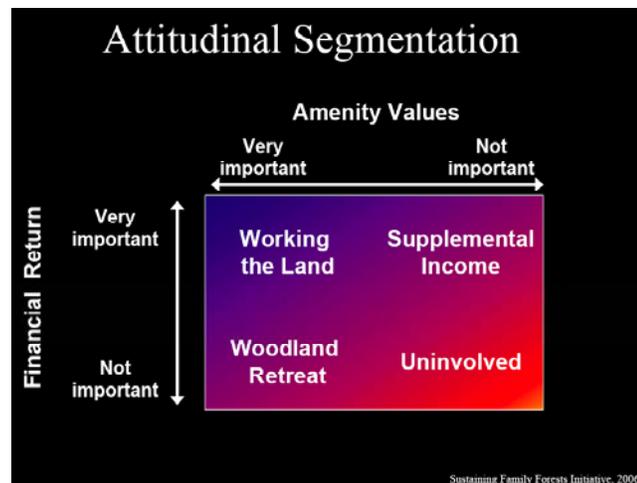
Keynote Speakers

Family Forest Owners: Who Are They?

Brett Butler, Research Forester, USDA Forest Service, Northern Research Station, Forest Inventory and Analysis

There are approximately 200,000 family forest owners in Minnesota who control 5.3 million acres of forestland or one-third of the state’s forest resources. These owners and their land represent the next phase of forest conservation in the United States. Through data gathered by the U.S. Forest Service’s National Woodland Owner Survey and the Sustaining Family Forests Initiative, Brett’s presentation helped to explain why family forests matter, who the current family forest owners are, the challenges these owners and the forestry community are facing, and ideas for addressing some of these issues.

Figure 1.



In his presentation, Brett emphasized that there is strong agreement that family forests are important and that more stewardship is needed on these lands. Beyond those general areas of agreement, it is challenging to agree on the details, but focusing on these two areas is an important place to start. In the social marketing research done by the Sustaining Family Forest Initiative, four types of family forest owner attitudinal segments have been identified: Working the Land, Supplemental Income, Woodland Retreat, and Uninvolved (Figure 1). These segments correspond to distinct ownership objectives and characteristics that can be used to more effectively engage landowners that align with each one. There is also the opportunity to use “Prime Prospect Segmentation” to identify landowners who are not currently engaged in land management but have favorable attitudes toward stewardship. Brett estimates that about 38% of Minnesota’s family

forestlands fall in the Prime Prospects category and most of these are “Woodland Retreat” and “Working the Land” types. This information and the plans for additional social marketing research and message development (Figure 2.) provide new and strategic opportunities to help meet the Million Acre Goal by engaging more new landowners and better serving those who are already participating in forest stewardship.

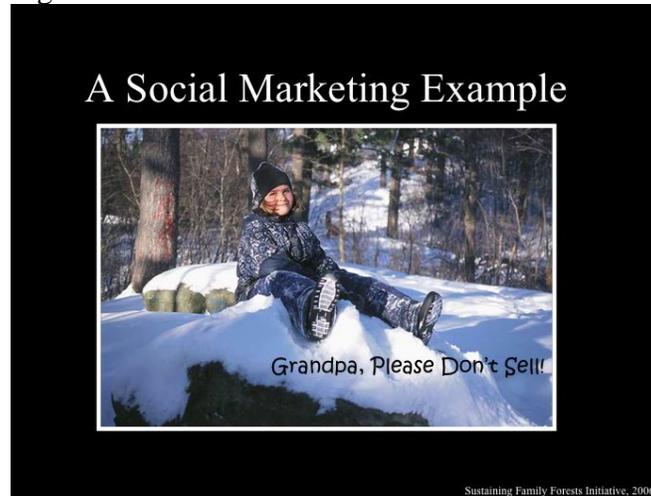
The Next Generation of U.S. Family Forest Landowners: Brace for Change!

Catherine M. Mater, President, Mater Engineering, Ltd., Senior Fellow, The Pinchot Institute for Conservation

During the next two decades, a major intergenerational transfer is expected in the ownership of private forestlands in the U.S. Most recent studies regarding the opportunities and challenges of managing family forests have focused on the current owners. Beginning in 2002, the U.S. Forest Service in cooperation with the Pinchot Institute for Conservation based in Washington DC initiated the nation’s first research focused on what offspring of current private forestland owners think about maintaining their family forestlands. The initial research results were alarming: many of these next-generation owners of the nation’s private forests have had little involvement to date in the management of their family forest, express little interest in becoming more involved, and do not live near their family’s forest. Yet – they expect to inherit the land and achieve income off the land. Complicating matters – female offspring and male offspring think differently about how the land should be managed, and few – if any – of the current incentives, assistance efforts, and programs designed to promote conservation and sound management of family forests in the U.S. address these burgeoning offspring issues. As a Senior Fellow of the Pinchot Institute for Conservation, Catherine Mater leads this benchmark research effort and her presentation focused on the results of the initial offspring research conducted across the U.S. and outlined preliminary results of follow-on state-specific research currently being completed.

The research shows that the next generation of family forest owners are: increasingly remote from their family forests, have livelihoods that are less connected with the land, lack prior involvement in the management, do not wish to be involved now, and want to own the land. There is also measurable disagreement between siblings that creates challenges to decision making about the future management of the land. Furthermore, male and female offspring have different priorities and ideas about the land, with male offspring more interested in income opportunities and female offspring more frequently

Figure 2.



expressing concern about family legacy. The presence of sibling disagreement and concern about expenses such as medical care create new challenges to engaging the next generation of family forest owners.

The survey results show strong concerns among the next generation of landowners regarding the rising costs of health care and medical expenses. In essence this concern builds a connection between human health and forest health. It is reasonable to consider that the single most important public policy opportunity to address the threat of parcelization may be universal health care. The fact is that dealing with catastrophic health costs is the single most significant indicator and prompter for forest landowners to parcelize and sell their property.

Given the new information and landowner characteristics being identified in the research, unique approaches and new outreach programs may be needed to effectively reach these audiences and make use of the new information. It is also important that the right groups be involved. In Wisconsin, the research found the Wisconsin Department of Natural Resources to be the most trusted source of information.

2007 Conference Outcomes

In addition to reviewing accomplishments to date and renewing the commitment to the Next Million Acre Goal, conference participants identified four specific recommendations for achieving the goal. These recommendations build upon efforts to date and add clarity to the opportunities and challenges that lie ahead. The proposed Action Steps provide direction for activities over the next 6 to 12 months.

Recommendation 1: Revamp the ad valorem tax

To advance this recommendation, the Minnesota Forestry Association will convene a meeting of the leaders of the key organizations to confirm commitments to the proposed Action Steps and to identify any additional strategies, partners or follow-up that may be needed.

Action Steps:

- Develop and circulate a sign-on letter to support the recommended changes to the tax law in the 2008 Legislative Session as presented at the conference². The effort will be championed by the Minnesota Forestry Association (MFA) and will focus on efforts to seek the support of the legislature and administration.
- Develop a fact sheet to support and explain the need for and benefits of the tax law changes. Blandin Foundation will coordinate development of the fact sheet. MFA will take the lead on its distribution and dissemination.
- Engage additional stakeholders and interested parties in this effort, including conservation organizations, Minnesota Seasonal Recreational Property Owners

² For more information, see the Conference presentation from Tom Kroll, available at: http://www.blandinfoundation.org/html/documents/VFVC%20FF%20Conf%2007/FFS_Property_taxes.pdf

Association, the Minnesota Association of County Assessors, and the Department of Revenue, among others. Minnesota Forestry Association will lead communications and coordination among these interests.

Recommendation 2: Forest Stewardship Capacity Building

To advance this recommendation, the Blandin Foundation will reconvene the conference Steering Committee to review these proposed action steps and identify the strategic path forward.

Action Steps:

- Develop specific (i.e., regional or county-level) targets for achieving the Next Million Acre Goal. Identify regional teams and partners to implement the plan.
- Analyze how many natural resource professionals are currently available and how many more may be needed to meet the 2.3 million acre goal (current acreage plus the additional million). This analysis would include evaluating plan writing capacity (and needs) as well as the capacity to implement scheduled management activities. Capacity for services must be sufficient to serve existing clients as well as anticipated growth. (If gaps in capacity are identified, strategies for addressing them will need to be developed.)
- Explore potential diversified fee structures for management plans, SFIA enrollment, and other services, including plan implementation and forester follow-up on management activities.
- Develop mechanisms (i.e., annual survey) to capture information about other management plans and activities besides those that are being registered with the MN DNR, potentially to include information about properties < 20 acres in size.
- Additional marketing to promote the Stewardship Program and to get landowners signed-up on a “waiting list” for getting a Stewardship Plan.
- Link Action Steps for this recommendation with the strategies being proposed by the Family Forest Action Team associated with the Minnesota Forest Resource Partnership’s Productivity Conference.

Recommendation 3: Social Marketing Research and Initiatives

To advance this recommendation, the Blandin Foundation will reconvene the conference Steering Committee to identify partners and specific activities to implement.

Action Steps:

- Strengthen connections with national social marketing efforts and develop a focus on specific audiences such as new landowners, realtors, women, multi-generations, lake associations, and estate planners. Targeting should also build upon available information about “prime prospects” and “possible defectors”.
- Apply the available volunteer time of Woodland Advisors to speak to neighbors and communities groups about the importance of forest stewardship and help sign-up landowners for stewardship plans.

- Develop a media campaign that promotes family forest stewardship and includes newspaper and newsletter articles, letters to the editor, and other communications. Messages should capitalize on climate change concerns, legacy issues, increasing understanding about available options, wildlife habitat, and the importance of land protection. A marketing specialist could assist with the effort.
- Social marketing efforts could be made more effective with additional research efforts. Research would evaluate demographic trends of new landowners and how to most effectively reach them. The Minnesota Forest Resources Council’s reconvened research advisory panel may aid in refining priorities for research. Extension is currently involved in planning for a national symposium on the topic of peer-to-peer woodland owner outreach in Fall 2009.
- Enhance the website MyMinnesotaWoods to include opportunities for landowners to easily sign up to get a stewardship plan. Online management plan research tools could also be further developed as well as an increased focus on habitat and other landowner interests. Additional use of video could enhance the website.

Recommendation 4: Certification Recommendations

To advance this recommendation, the partners on the LCMR project “Third-Party Certification for Family Forests” will convene to review the proposed action steps. The project partners will also compile recommendations to report back to the LCCMR.

Action Steps:

- Explore the development of a statewide carbon credit program or other carbon trading approach that would provide an additional incentive for family forest stewardship, align with certification requirements and build upon work done by the Center for Integrated Natural Resources and Agricultural Management (CINRAM).
- Develop a business plan for the logger certification program to evaluate the potential for a self-supporting program and to set programmatic goals and rationale.
- Pursue LCCMR support (or other funding) for a statewide certification initiative that emphasizes the development of additional stewardship plans that meet the logger certification requirements (for properties >100 acres in size) and also addresses forest management certification standards.
- Expand training, outreach and marketing efforts related to certification. Engage foresters and service providers in learning more about certification opportunities and how to assist landowners with identifying a certified logger or other programs. Engage existing certificate holders (i.e., large public land managers and private industry) in sharing certification information.

Summary of Recommendations and Action Steps

	Lead Party	Key Partners	Action Steps	Notes
Recommendation				
Revamp the <i>ad valorem</i> tax	Minnesota Forestry Association (MFA)	Blandin Foundation, Minnesota Seasonal Recreation Property Owners Association	Planning Meeting Fall 2007 Sign-on Letter Fact Sheet	Progress to be monitored through 2008 Legislative Session
Forest Stewardship Capacity Building	Minnesota DNR	Stewardship Committee, Extension, Minnesota Association of SWCDs, Minnesota Association of Consulting Foresters	Coordination meeting with Conference Steering Committee. Strategic Planning Meeting with the MDNR. Develop targets for Next Million Acre Goal. Analyze capacity to provide services. Explore fee structures for services. Capture information about other plans. Marketing the Stewardship Program. Link with the MFRP's Action Team.	
Social Marketing Research and Initiatives	Minnesota Forest Resources Council's research advisory panel	UofM Extension, Woodland Advisors	Connect with nat'l social marketing efforts. Woodland Advisors help sign-up landowners for stewardship plans. Develop a media campaign. Refine priorities for social marketing research. Enhance the website MyMinnesotaWoods	

<p>Certification Recommendations</p>	<p>LCMR Project Partners</p>		<p>Report recommendations back to LCCMR Explore carbon credit programs. Develop a business plan for the logger certification program. Pursue funding to support a statewide certification initiative. Expand training, outreach and marketing efforts related to certification.</p>	
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Participant Feedback about the Conference

The overall feedback for the conference was positive with a strong majority (85%) indicating approval for the amount of progress that has been made in reaching the Million Acre Goal over the past year.

Conference Steering Committee

The Conference Steering Committee assisted with the planning and development of the event and the preparation of the proceedings. Membership in the committee includes representatives from the Blandin Foundation, the Minnesota Department of Natural Resources, Extension, Dovetail Partners, and the Minnesota Forestry Association. Numerous additional organizations and individuals have also contributed to this effort and are invited to continue to participate as the work continues!

Conference sponsors

These organizations have endorsed the Next Million Acre Goal of increasing by one million the number of acres of family forestland under stewardship by 2015.

Ainsworth, American Tree Farm System, Boise, Campaign for Conservation, Dovetail Partners Inc., Forest Capital Partners, Minnesota Association County Land Commissioners, Minnesota Association of Consulting Foresters, Minnesota Association of Soil & Water Conservation Districts, Minnesota Deer Hunters Association, Minnesota Department of Natural Resources, Minnesota Forest Industries, Minnesota Forest Resources Council, Minnesota Forest Resources Partnership, Minnesota Forestry Association, Minnesota Logger Education Program, Minnesota Seasonal Recreational Property Owners Coalition, Potlatch, Ruffed Grouse Society, Sappi, Society of American Foresters, StoraEnso, The Conservation Fund, The Nature Conservancy, U of M Extension, U.S. Forest Service, University of Minnesota Duluth Natural Resources Research Institute, University of Minnesota's Department of Forest Resources, UPM, and U of M Extension Woodland Advisor Program