

# 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 14<sup>th</sup> 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

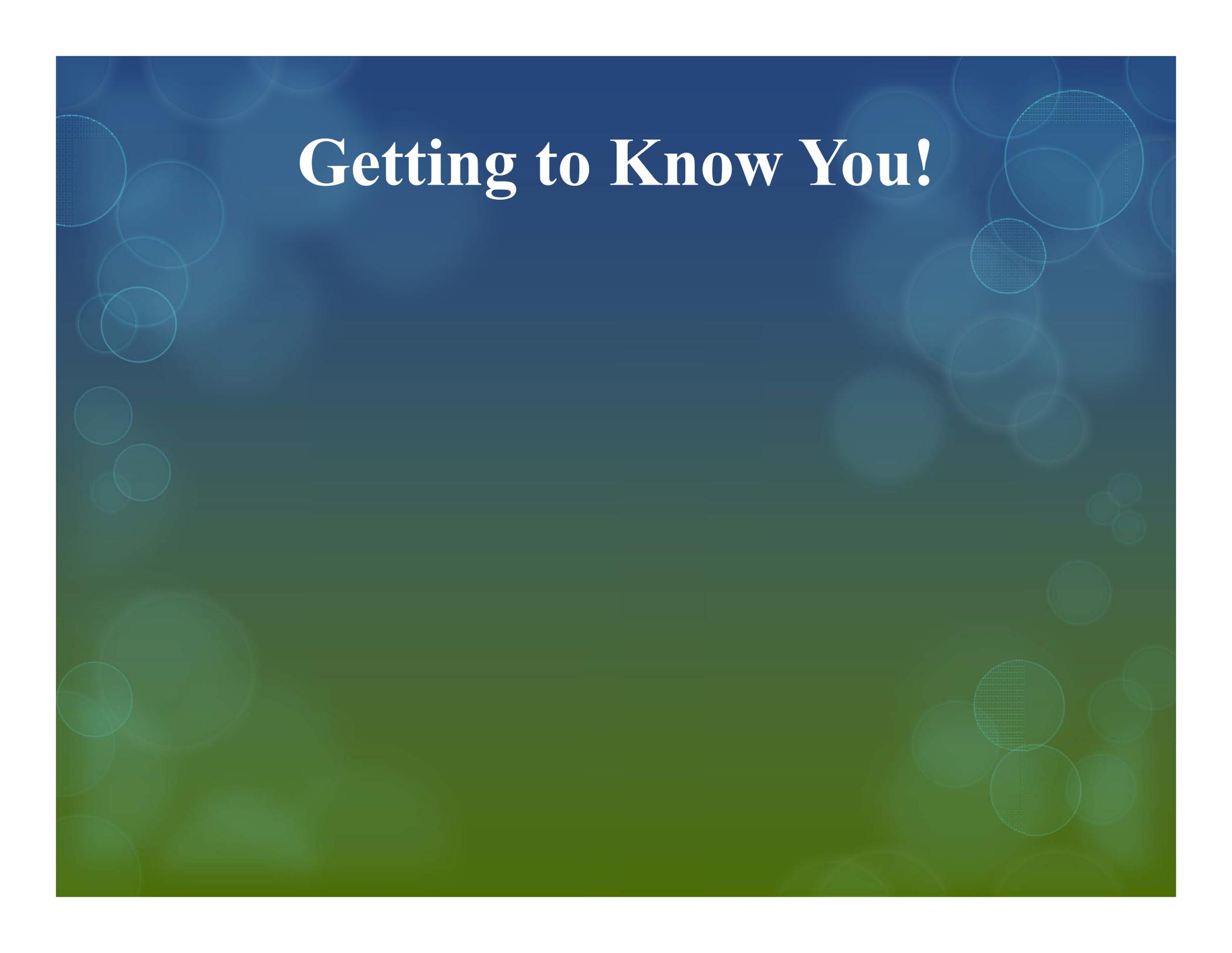


**Allen and Ginny  
Nipper**  
Landowner Legacy  
Communication

# 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](mailto: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 or have a dotted pattern, creating a complex, layered visual effect.



**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

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

# Conclusions

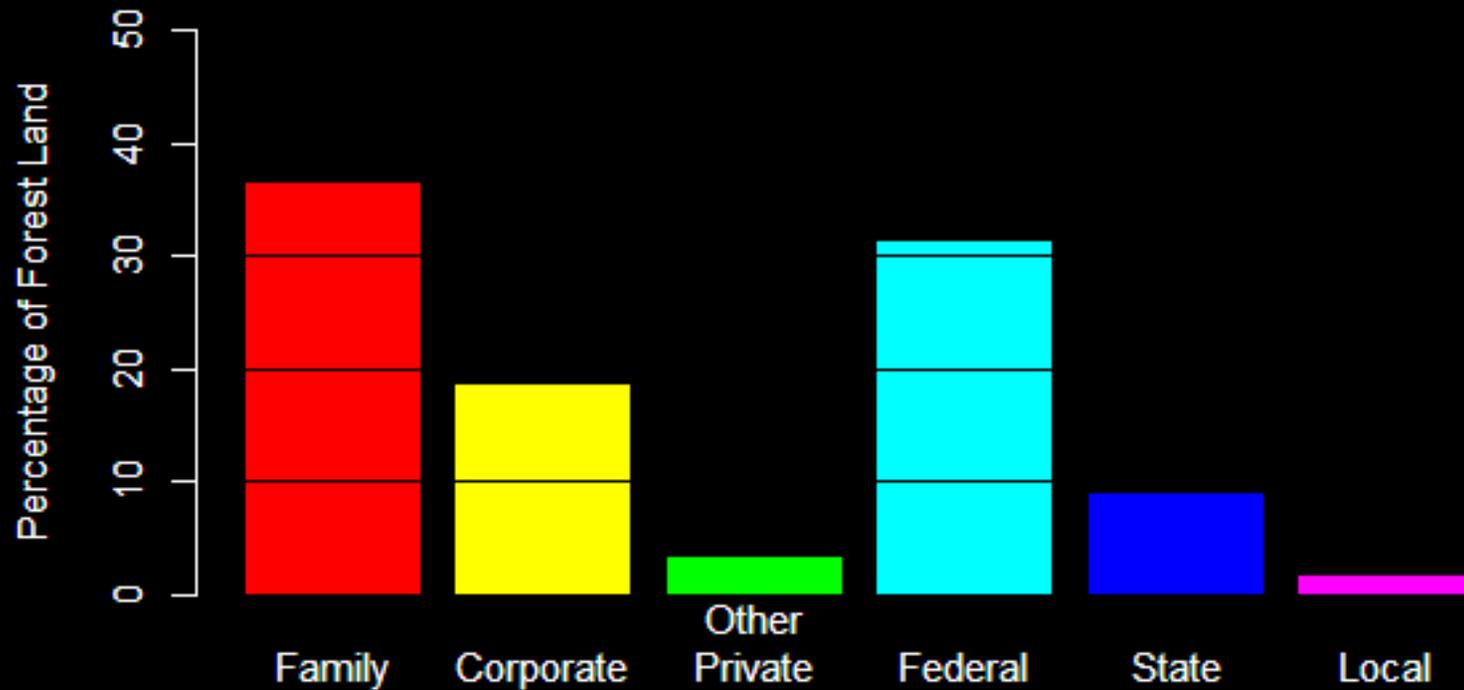
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- Family forest owners rule!
- Size matters
- Beauty, wildlife, legacy, nature, privacy
- To manage or not to manage?
- A bunch of old guys
- Family forest owners don't own forests

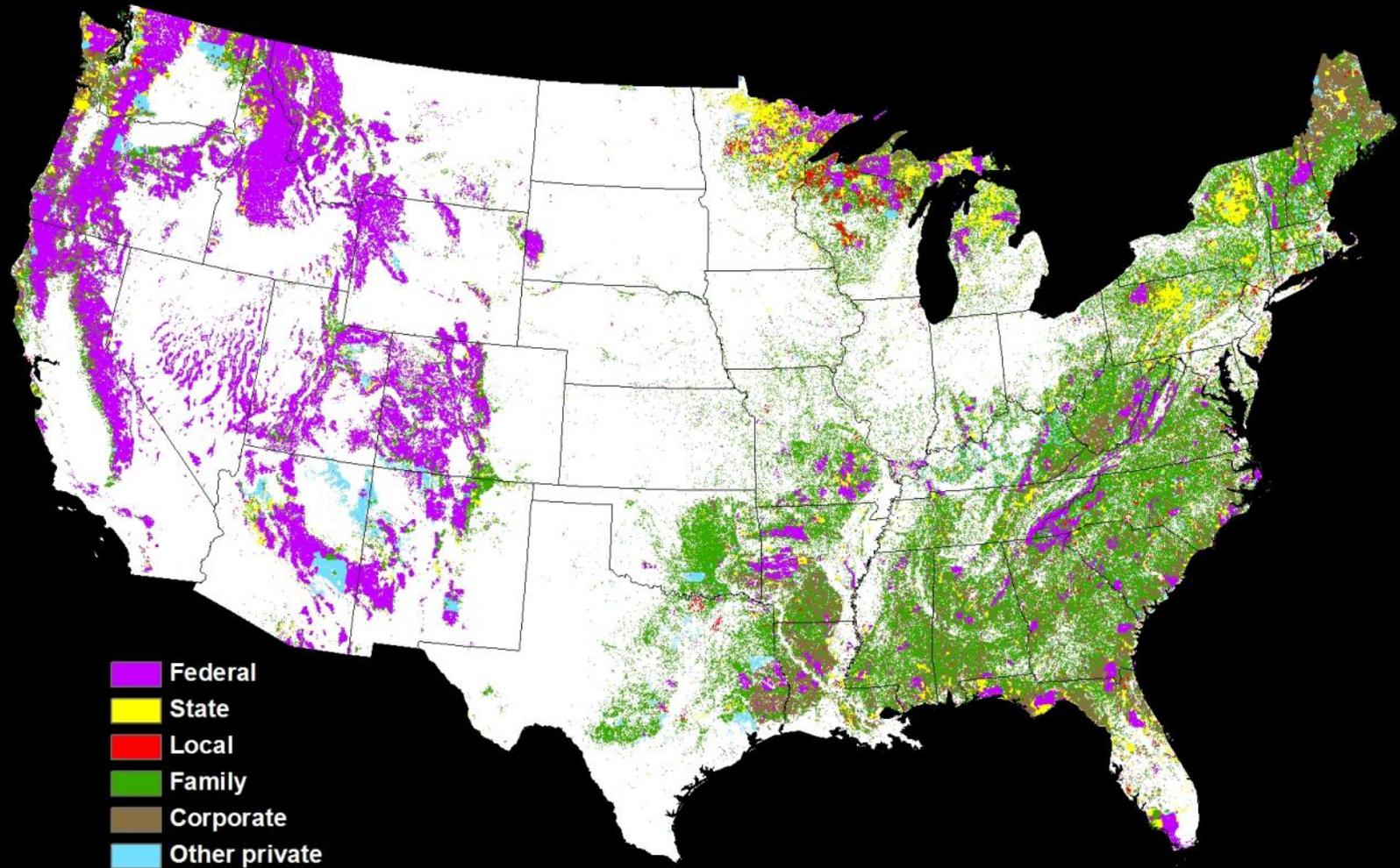
Family Forest  
Owners Rule!

# Forest Land by Ownership Class

## US, 2011-2013

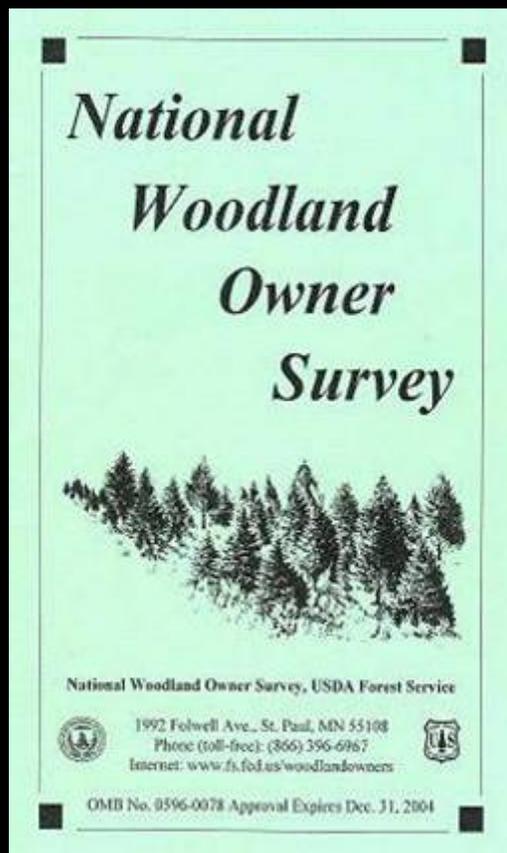


# Forest Ownership, US 2011-2013



# National Woodland Owner Survey

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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

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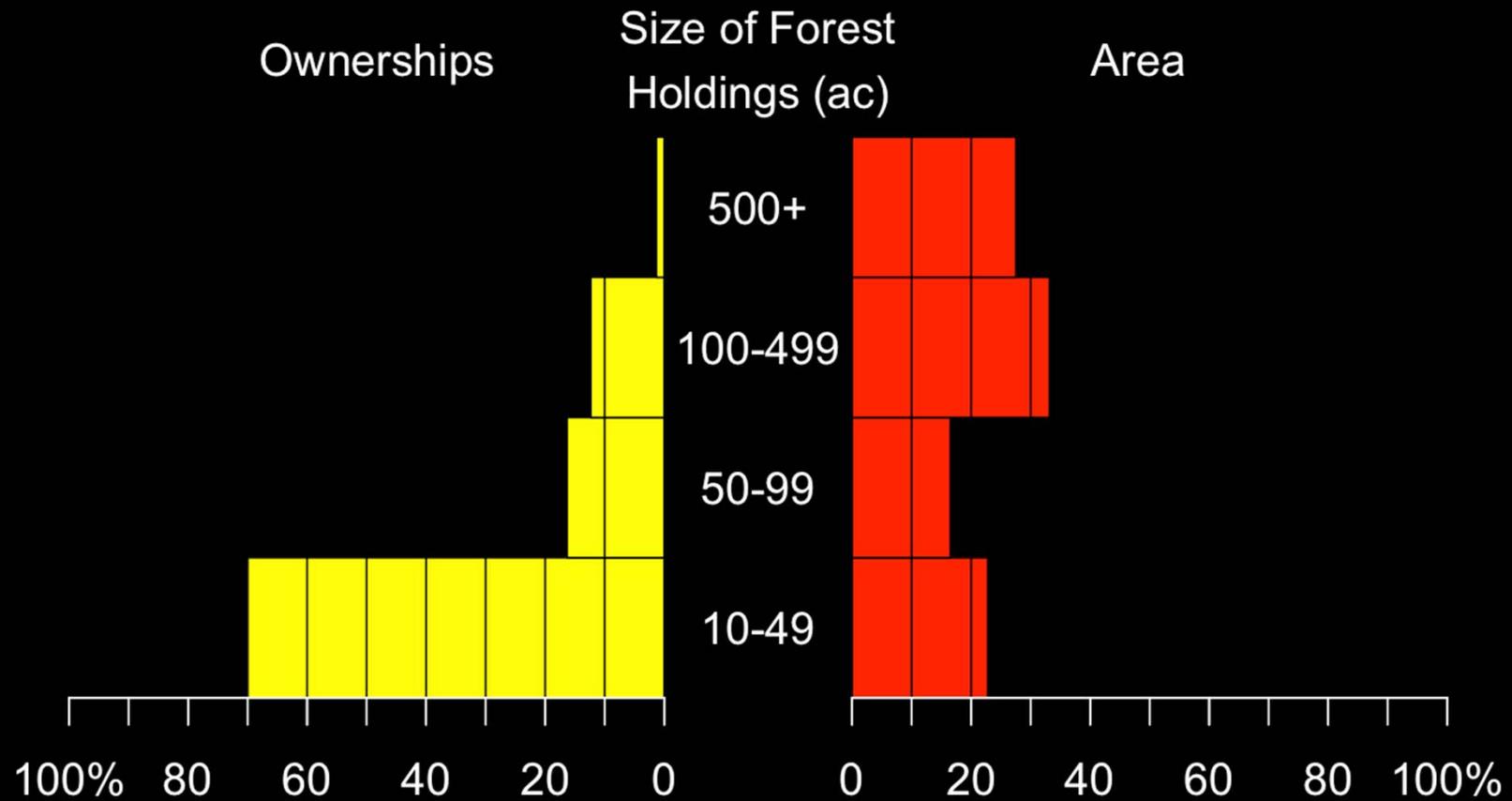
- Acres: 268,633,000
- Ownerships: 4,077,000
- Average holding size: 66 acres
- Owners: 9,728,000

**PRELIMINARY RESULTS**

Size Matters

# Size of Forest Holdings

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



**PRELIMINARY RESULTS**

Beauty

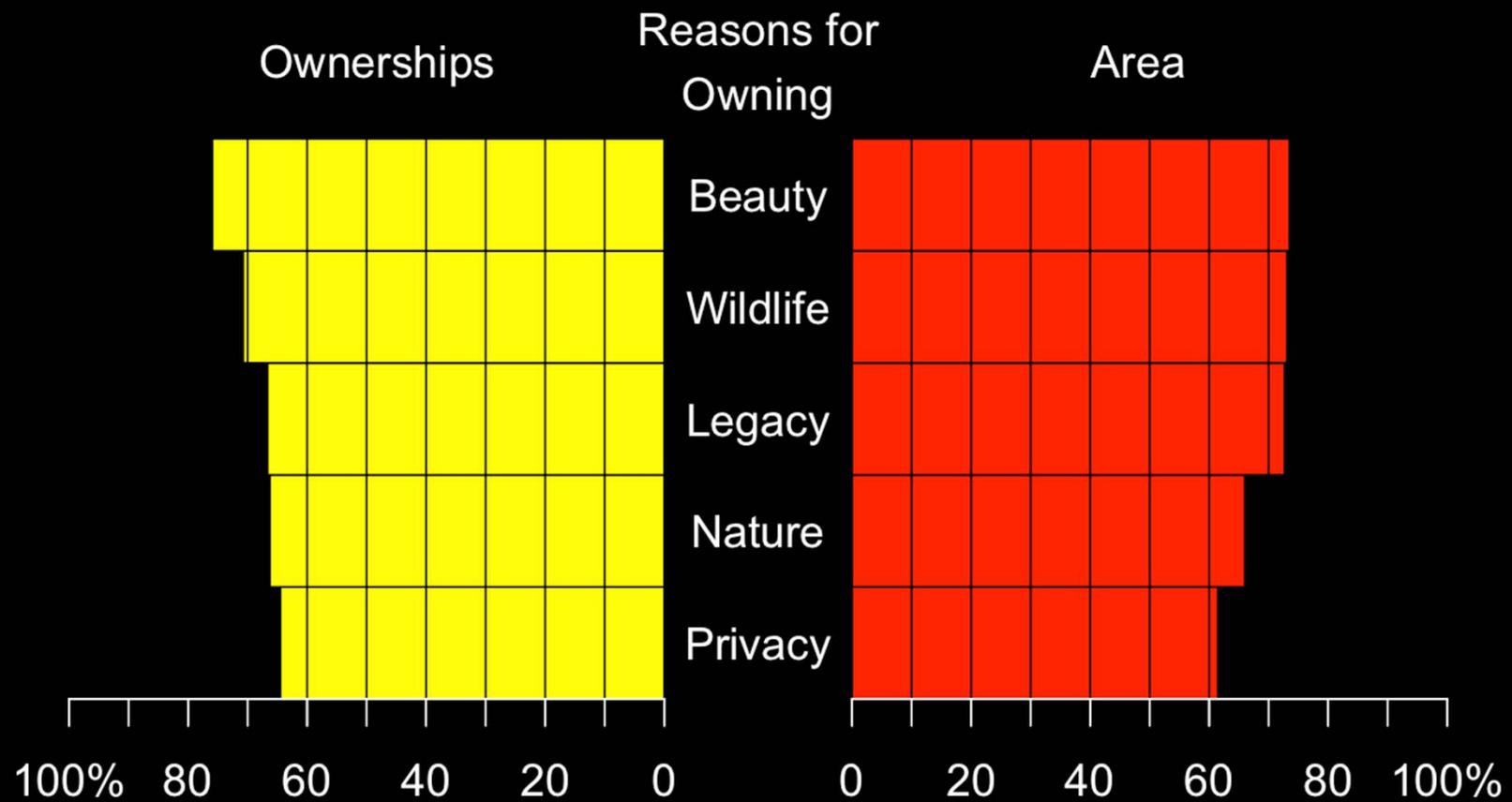
Wildlife

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

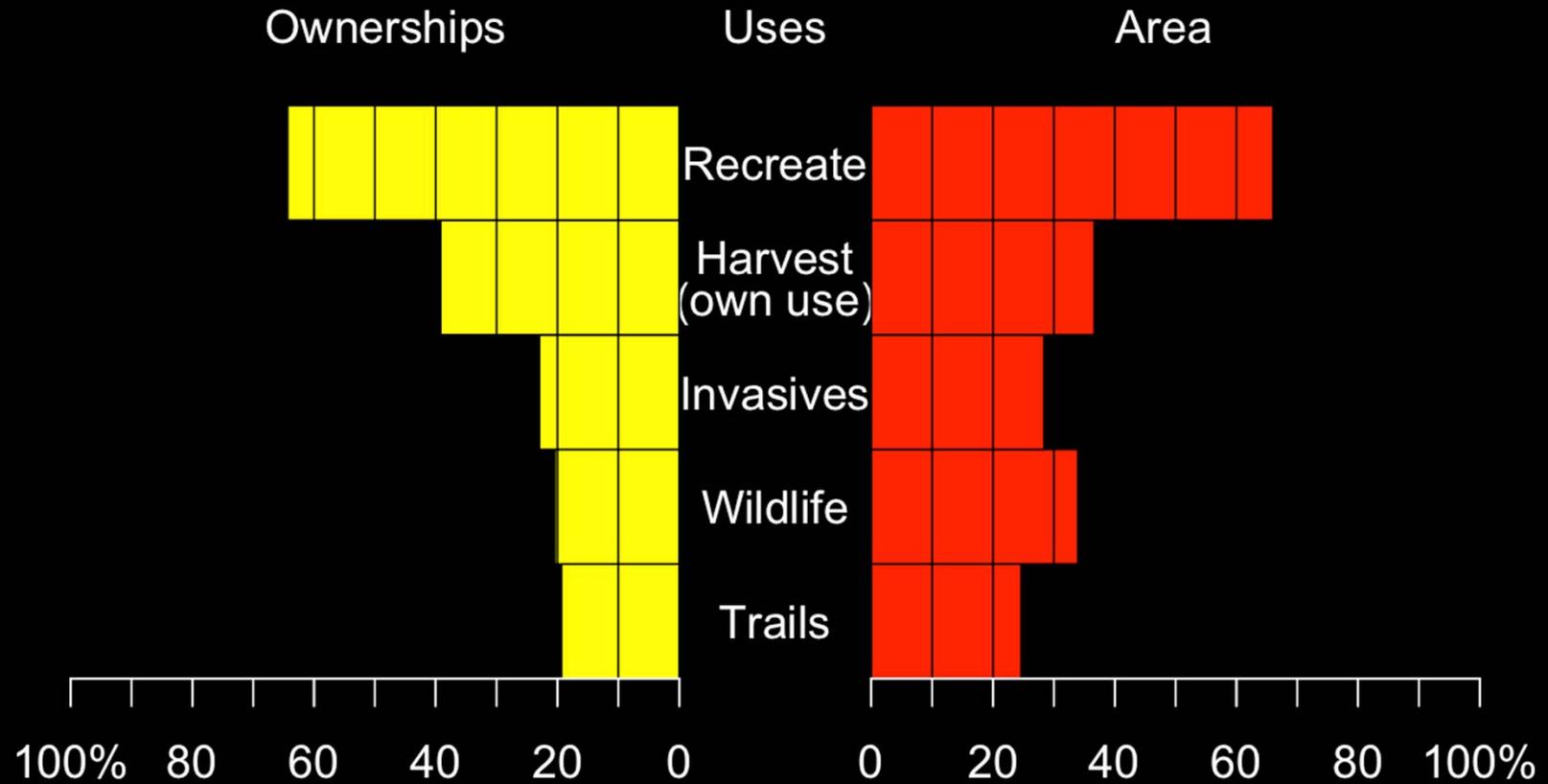


**PRELIMINARY RESULTS**

To Manage or  
Not to Manage?

# Uses

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



**PRELIMINARY RESULTS**

# Management

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

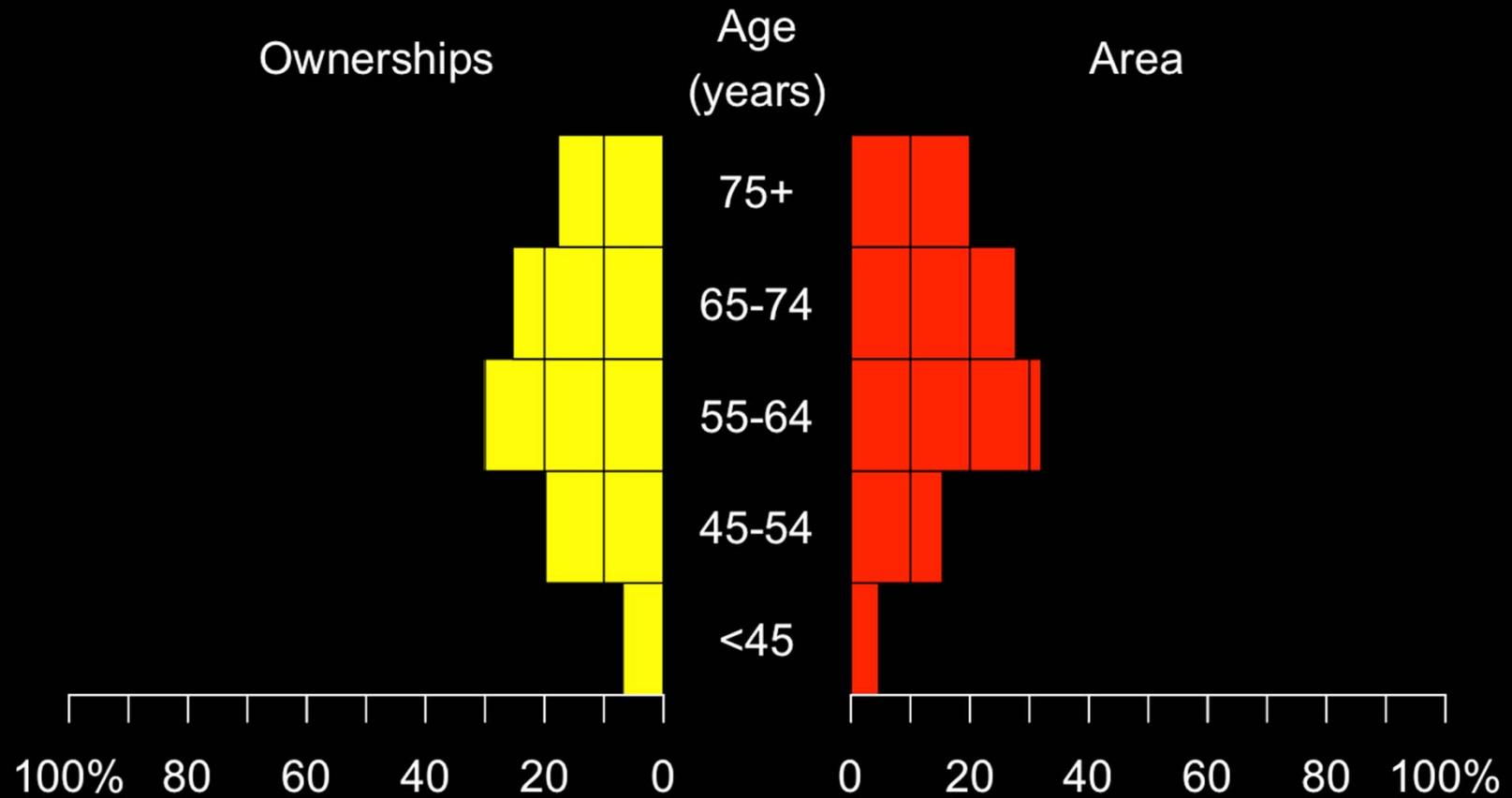


**PRELIMINARY RESULTS**

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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## 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

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- 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

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



**Paul Catanzaro**

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

# Conservation-Based Estate Planning



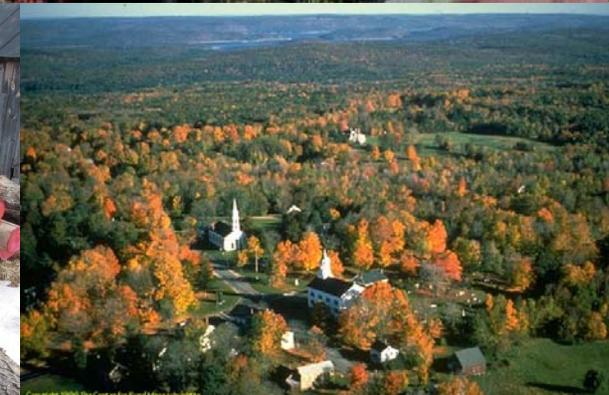
**Paul Catanzaro**  
**Extension Assistant Professor**  
**UMass Amherst**

**Forest Emergency**

**BREAK GLASS**  
← ● →  
**PRESS HERE**



# What's at Stake?



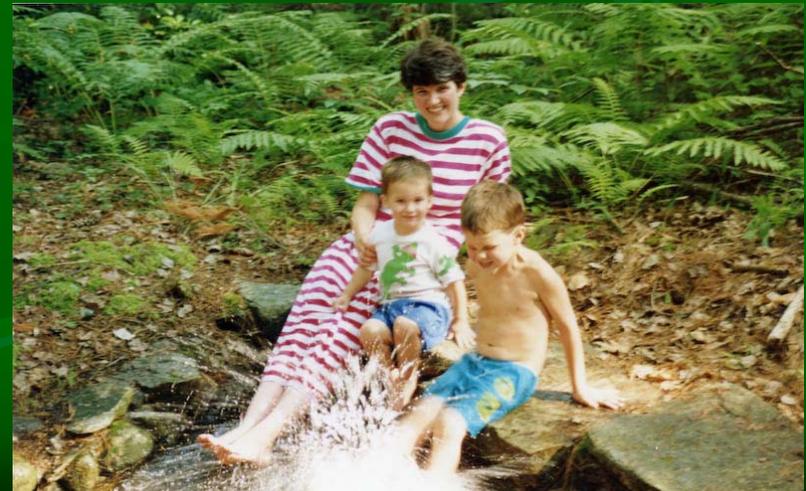
Copyright 2006 The Center for Rural Massachusetts

# 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”*

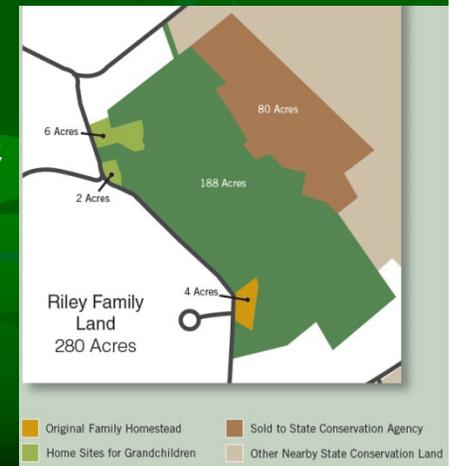
- Try to get as much undeveloped land passed to a new owner in as big of an ownership possible.
- In other words, reduce conversion & reduce parcelization.



# 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

<b>Barrier/Barrier Grouping</b>	<b>Mean Percentage of Respondents</b>
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" <sup>a</sup>	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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(413) 545-4839

[www.MassWoods.net](http://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<sup>©</sup> 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:**

<b>plans</b>	<b>work</b>
<b>tours</b>	<b>records</b>
<b>financials</b>	<b>profits</b>

# 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<sup>©</sup> Program**

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

- **Contact information**

**Ginny and Allen Nipper**

**Landowner Legacy Communication**

**318-773-7158**

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**[allen@landownerlegacy.com](mailto: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](mailto:sstein@fs.fed.us)

Sara Comas - [scomas@fs.fed.us](mailto:scomas@fs.fed.us)