

# Landscape Scale Restoration Project Report



**Project Name:** Ties to the Land: Succession Planning for Family Forest Owners

**Funding Year:** 2010

## Stakeholders

Forest Service Region: USDA Forest Service - R5

Sponsoring Organization: California Dept. of Forestry and Fire Protection

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Participating Organizations: Oregon Dept. of Forestry, Idaho Dept. of Lands, Washington Forestry

Grantee: Elkhorn Slough Foundation

## Project Funding

Agreement(s): 10-DG-11052021-243

Funding Sources

## Project Design

### Project Purpose

The goal of this three year, multi- state project with the states of Idaho, Oregon and Washington is to protect family forest lands from fragmentation and conversion. The objective is to deliver critically needed information about succession planning (above and beyond traditional estate planning education) through a unique, award-winning program called "Ties to the Land", using workshops, newsletters, community networks and the internet.

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## National Themes & Outcomes

### **Conserving and Managing Working Forest Landscapes**

#### **Protect Forests from Threats**

#### **Enhance Public Benefits from Private Forests**

### Strategic Issues

Forest conversion, fragmentation and lack of effective succession planning are national issues. This program's concepts and content are directly transferable to other land ownership types and are already in use to support farmland preservation in some locales. The hope is that rapid adoption of Ties To The Land will occur across the west and the nation.

January 2013 update. Family forest owners that do not own enough forest land to operate it as a full time business own twice as much forest land (1/2 of low timber productivity but with many other important values) as timber companies. Keeping this cost-efficient ownership system in place for forest lands is critical for larger social goals that require maintaining and improving forest area and quality. Increasing the fraction of family forests that have a strong succession plan in place that keeps the land from being fragmented and sold remains a key strategic challenge in the West

### Collaboration & Partners

The University of California Cooperative Extension, Forest Owners of California, California Farm Bureau Federation, Sierra Business Council, Buckeye Conservancy, and the California Association of Conservation Districts are well-established entities and are thoroughly committed to supporting long-term retention and sustainable management of family forest lands.

January 2013 update. No change in partners. Forest Landowners of California (FLC) have been the most active partner as they have a statewide membership and are more focused on family ownership issues.

## **Accomplishments**

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## Deliverables

The ultimate sustainable outcome of this project will be family forest lands which successfully transition through generational ownership change, as a result of effective succession planning, and continue to be family-owned and sustainably managed in the long-term.

### January 2013 update

The 4 hour training workshops have proved very effective at introducing family ownerships to the need to start succession planning. Discussions with participants on their specific situations highlighted the need for follow up materials relating to the final parts of training - how to find, interview, and work with professional accountants, consulting foresters, estate planners, lawyers, and others that can successfully help families craft and implement a plan. We plan to hire a consultant to develop these materials.

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## Accomplishments to Date

After a train the trainers program in April 2011, we decided to follow the model in Oregon where the Ties to the Land workshop will be broken into 2 2/12 hour evening sessions. The largest task was collating parcel ownership lists from the assessors in 19 counties, aggregating parcels with the same 'tax bill address', separating out family from purely business ownerships, and then contacting family based ownerships with parcels large enough to be considered economical to manage. Since California has more family forest owners than Oregon, Washington, and Idaho put together, this is a huge task that we had assumed we would do with consultants. With the recent addition of a policy analyst at the University who could do this the first time and manage the owner outreach, Ton Wu, we decided to do it in-house. In addition to designing and getting advisor feedback on a mailed postcard, this process took more than 4 person weeks of effort. These sequential workshops are designed to be attended by the same participants. The first workshop describes the issues involved in getting a better understanding of the values held by the current owner/manager generation as well as their successors who typically do not live on or even near the forest or ranch property. The workshop is held before the Thanksgiving and Christmas holidays to increase the chance that family members will have a chance to do the suggested exercises before they come back for another workshop in early 2012.

In September 2011, we mailed out approximately 12,000 large postcards to family forest owners with more than 50 acres of forest or rangeland across Northern California. The postcard listed the goals of the workshops, the locations, and sources of more detailed information on our web site, <http://ucanr.org/sites/forestry/>, or by calling our office. From October 10, 2011 to November 11, 2011 UC Extension Specialists and County Advisors ran 11 workshops. We had 187 attendees, with many families represented by multiple people. Based on survey responses, we estimated that the attendees in aggregate owned around 87,000 acres of forest and rangeland. There was quite a bit of enthusiasm for the topic as there are many owners in the demographic position where successfully passing on their property to their heirs is on the immediate horizon.

A second key indicator is the stated response of the attendees. We administered an evaluation following the first round of workshops (concluding in February 2012), and received 58 assessments. On a scale of one to four, with four being the highest, the average marks given to "presentations" and "printed materials" averaged 3.49 and 3.45 respectively. On a seven-point scale ranging from "-3" to "3", with "3" representing "a lot", the average score given by attendees to the usefulness of the workshops was 2.19. Finally, 85% of the evaluations indicated that the workshop had met their expectations.

## January 2013 update

In the winter of 2012 we completed the second half of the 11 workshops we did in the Fall of 2011. In the fall of 2012, we held 5 more evening workshops (with followup planned for Winter 2013) and are organizing 3 one-day workshops in new counties. We experienced dropping numbers in this round and see that closer contact with local land trusts, NRCS, and RCD offices are important as interviews with landowners suggest that they are key 'entry points' for new information that is then passed on along the face-face 'coffee shop' or other meeting routes.

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## Deliverables in Progress

Next steps include the second half of the Ties to the Land Workshops based on the DVD based materials from Oregon State, the development of more detailed followup workshops with both speakers who own land and have gone through the process of properly getting the information and necessary advisors to craft a plan, and the development of a strategic plan that links University resources, landowner based organizations that have members and workshops that can help newly concerned owners, and the development of more cost-effective and still interactive knowledge delivery systems. This may include 2-way communications using the web (canned webinars are OK but lack the vibrancy of meetings where the audience and other experts can get involved in discussions) and other means.

## Challenges

Our biggest challenge from a grant point of view is that accomplishing the services that can make extension specialists and advisors more effective would be done best with additional personnel services. Since we did not have any employees when we wrote this grant, we thought we would use consultants. Now that we have a policy analyst with a BS as well as a MS in resource economics, we like to shift funds from contracts to personnel services. We will complete this budget change proposal in early 2012.

In 2012, we will submit a change of scope that will be more than 10% of the total \$70,000 budget.

January 2013. As noted in the other sections, our biggest challenges are 1) improving our outreach to reach landowners who are not already involved in getting advice and technical information from cooperative extension and other government sources and 2) being able to provide California-centric information on qualified professionals and the key questions to address in California (due to slightly different legal and regulatory systems than Oregon). We will submit a budget change proposal to address these issues.

## **Information Last Updated**

3/23/2015