

# Landscape Scale Restoration Project Report



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

**Funding Year:** 2010

## Stakeholders

Forest Service Region: USDA Forest Service - R6

Sponsoring Organization: Washington Forestry

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Participating Organizations: Oregon Dept. of Forestry, California Dept. of Forestry and Fire Protection, Idaho Dept. of Lands

Grantee: Washington Forestry

## Project Funding

Agreement(s): 10-DG-11062764-014, 10-DG-11062764-010, 10-DG-11010000-010

Funding Sources

## Project Design

### Project Purpose

The goal of this three-year, four-state project is to protect family forest lands from fragmentation and conversion, that may occur when property passes from one generation to the next, by helping families plan for that transition. 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. The award-winning Ties To The Land curriculum was developed and tested by Oregon State University. OSU has now developed a Ties To The Land Initiative, with support from the American Forest Foundation,

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which coordinates further curriculum development and dissemination of educational support materials nationwide. This information will assist families in developing an effective succession plan to help ensure the long-term retention and effective management of their forest lands. The project will build capacity and a sustained commitment to succession planning education, providing a collaborative model that can be readily applied nationwide.

State Forestry and Extension agencies in Washington, Oregon, Idaho, and California will coordinate each state's efforts. Each state will coordinate with other organizations and agency partners to develop a statewide strategy to deliver Ties To The Land succession planning workshops at times and geographic locations that best meet landowners needs. Each state will extensively advertise and aggressively promote the workshops through direct mail, newsletters, websites, peer to peer learning, and emerging social marketing and networking channels. States will train and support facilitators to conduct the workshops. Program effectiveness will be measured by a statistically-valid participant survey conducted by Oregon State University across all four states.

## Outputs and Outcomes:

- 1) Approximately 70 Ties To The Land, and related supporting workshops, will be conducted statewide in each of the four states (10 in Idaho, 20 each in California, Oregon, and Washington).
- 2) An estimated 1600 individuals (770 families) will learn how to develop an effective plan for inter-generational succession of their property.
- 3) The long-term retention and management of over 200,000 family forest acres will be positively affected across four states. (Acreage estimates for each state made using National Woodland Owner Survey data).
- 4) New curriculum materials will be developed, as previously described, and made available for use nationwide.
- 5) Program effectiveness will be formally evaluated by a university-designed and conducted sampling protocol across all 4 states. (When Ties To The Land was first "pilot tested" 77% of participants indicated that they received valuable tools which allowed them to pursue effective succession planning for their land).
- 6) Ties To The Land succession planning education will become "institutionalized" as regular part of on-going landowner assistance and education programs in each state.
- 7) Improved Ties To The Land curriculum and educational materials will be available, through the OSU Ties To The Land Initiative, for use anywhere in the nation by agencies and organizations concerned with long-term retention and management of family-owned forest, farm, and ranch land

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Funds from this grant, are needed and will be used for the following specific purposes:

- 1) Training workshop facilitators
- 2) Travel support for facilitators and workshop collaborators.
- 3) Advertising and promotion.
- 4) Facility rental.
- 5) Curriculum development and production of new educational materials
- 6) Purchase and distribution of educational materials.
- 7) Program evaluation,.
- 8) Program administration and reporting.

## National Themes & Outcomes

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

- Forests are actively and sustainably managed.

### **Protect Forests from Threats**

- Threats to forest and ecosystem health are identified, managed and reduced.

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

- Water quality and quantity is protected and enhanced.
- The economic benefits and values of trees and forests are maintained and enhanced.
- Wildlife and fish habitat is protected, conserved, and enhanced.
- People are connected to trees and forests and are engaged in environmental stewardship activities.
- Trees and forests are managed and restored to help mitigate and adapt to changing conditions.

## Strategic Issues

Forest conversion and fragmentation are major strategic issues facing every state, including the four cooperating in this grant. Ties To The Land helps facilitate orderly inter-generational transfer, and long term retention and stewardship of forest lands, thereby, discouraging conversion and fragmentation.

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## Collaboration & Partners

This is a four-state project across three USDA Forest Service Regions (1, 5, and 6). Primary grant recipients are Washington State Department of Natural Resources, Oregon Department of Forestry, Idaho Department of Lands, and University of California Berkeley Extension. The grant deliverables in each state will be accomplished by the Land Grant University Extension Services: Washington State University Extension, Oregon State University Extension, University of Idaho Extension, University of California Berkeley Extension. Other agencies, organizations, and non-profit groups will also cooperate in each of the states to advertise and help conduct Ties To The Land Educational Workshops.

Ties To The Land is an educational program aimed at helping landowners to successfully plan for intergenerational transfer and long term retention of family-owned lands. The program was developed at Oregon State University, which continues to serve as the national coordinating and program resource development center.

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## Accomplishments

### Deliverables

Approximately 70 Ties To The Land, and related supporting workshops: 20 each in WA, OR, and CA; 10 in Idaho.

### Accomplishments to Date

ID - Agreement finalized between Idaho Dept. of Lands and University of Idaho Extension to conduct 10 Ties To The Land Workshops. 2 trained workshop facilitators hired. 5 workshops held in 2011 attended by 71 landowners. 2012: 2 additional workshops - 30 attendees. 2013: 3 workshops attended by 61 people.

CA - Grant agreement executed directly between USDA Forest Service and UC Berkeley Extension. UC Berkeley Extension Forester met with trained facilitators in Oregon. Workshop facilitator training completed with 7 new facilitators now in place. 11 workshops held in 2011 attended by 187 landowners. 2012: 6 additional workshops - 38 families attended. 2013: 9 workshops attended by 192 people.

OR - Agreement between Oregon Department of Forestry and Oregon State University Extension completed. 9 workshops held in 2011 attended by 147 landowners. 2012: 11 additional workshops - 199 attendees. 2013: Accomplishment report pending.

WA - Agreement between DNR and WSU Extension executed. Planning session held.

Tentative locations, and lead persons, identified for 20 workshops statewide over next three years. No workshops held in 2011 due to an issue regarding authority to spend these grant funds (now resolved). 2012: 5 workshops - 152 attendees. 2013: 15 workshops attended by 310 people.

### Deliverables in Progress

Project is complete and all workshops and program deliverables have been completed in all states.

### Challenges

WA - Experienced an initial delay because the State Office of Financial Management did not grant the required "spending authority" to begin work on this grant until late 2011. Despite this initial delay, it is still anticipated that the deliverables of this grant will be accomplished within the prescribed time period.

OR - Experiencing some issues obtaining data for landowner database, however, these are not anticipated to affect the successful implementation of the Ties to the Land project.

2012: No current issues - work progressing as planned into 2013.

2013: No issues reported by participating states.

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**Information Last Updated**

12/3/2015

