

BEST PRACTICES PRIMER

FROM ENGAGEMENT TO ACTION

Supporting Woodland Owners in
Decisions About Their Land



NEW ENGLAND
FORESTRY
FOUNDATION

Lessons in Conservation, Forestry and Climate Adaptation Outreach Distilled From the MassConn Woods Experience

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ACRONYMS, ABBREVIATIONS AND TITLES

AFF: American Forest Foundation

NEFF: New England Forestry Foundation

NIACS: Northern Institute of Applied Climate Science

MassConn: MassConn Sustainable Forest Partnership, a Regional Conservation Partnership or RCP that includes more than 30 public and private forest conservation entities committed to working together to increase land protection and sustainable forest management in 38 towns in south central Massachusetts and northeastern Connecticut.

My MassConn Woods: Landowner-facing branded name for multi-partner outreach initiative following AFF nomenclature

MassConn Woods Landowner Outreach Initiative: NEFF/AFF/ MassConn outreach project name

RCP: Regional Conservation Partnership; MassConn is one of 44 in New England



From Engagement to Action:
Supporting Woodland Owners
in Decisions About Their Land

EXECUTIVE SUMMARY

Forests blanket 80 percent of New England. They provide key services to society, such as maintaining drinking water quality and quantity, cleaning the air, and reducing the extent of damaging climate change (Perschel, Giffen & Lowenstein, 2014). And they are under threat. New residential and commercial development has eaten away about a million acres of forest since the 1980s—an area larger than the entire state of Rhode Island (Foster et al., 2017, p. 11). Development continues to spread from cities, suburbia and even along rural roads in certain areas near the Maine coast and in Berkshire County, Massachusetts. When forest is converted to homes, lawns and shopping malls, this loss permanently reduces forests' abilities to store carbon while creating traffic congestion and associated increased emissions, reducing the viability of rural farm and forest enterprises, and damaging wildlife habitat.

How can we halt this forest loss? The path to success must involve the owners of these New England forests—the 215,000 owners of 10 or more acres. The decisions these owners make in the coming two or three decades will have a profound impact on whether many of our communities retain their rural, wooded or agricultural heritage and whether our forests can play a vital role in mitigating climate change. However, data indicates that the decades-long effort to communicate with landowners using traditional methods has largely failed to spur them to action. In order to meet our goals for New England, we need a better, more efficient and more effective way to communicate with these landowners and align their good intentions toward policy goals. The intensive communication project detailed in this report—the **MassConn Woods Landowner Outreach Initiative**—successfully demonstrates that sustained application of innovative approaches will work to get landowners to protect and better manage their land. With

the appropriate funding, these new approaches, in concert with promising peer learning strategies now being piloted, can be scaled up regionally to reach all New England landowners to protect our landscape from development and introduce new forest management techniques to mitigate climate change.

What would success look like? Our forests would be protected from development. Wildlife would be more plentiful and threatened species assured a future. New Englanders would produce more of the wood products they consume from locally well-managed forests rather than from questionable imports. And in addition, applying Exemplary Forestry practices on these private lands—with benefits to wildlife, carbon storage and wood product markets—could offer the mitigation equivalent of taking every car in New England off the road for 20 years, according to estimates by the New England Forestry Foundation. How we communicate with landowners will determine whether we capture these climate mitigation possibilities and whether our region's forest remains healthy and resilient enough to continue providing the tangible benefits of clean water, clean air, soil, wildlife habitat and forest products that our society counts on them for.



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This document produced by New England Forestry Foundation reports on a focused effort to apply new approaches to reach out to forest landowners and engage them in improving their forest management and exploring conservation outcomes. The results show a nearly four-fold improvement over the response rate achieved by traditional forestry outreach, and have generated key, replicable findings that could advance efforts to retain forest ecosystem services for the benefit of all New England citizens.

The results suggest recommendations for funders, land trusts, regional partnerships, and federal and state agencies. Adoption of these recommendations would result in sustained engagement with landowners in key conservation geographies, improved efficiency of outreach by local conservation and forestry organizations, faster incorporation of new themes such as climate adaptation strategies into outreach campaigns, and improved networks among outreach practitioners to foster innovation and improved program evaluation. This document identifies the necessary communication tools and approaches.



My MassConn Woods: Outcomes by the Numbers

The MassConn Woods Landowner Outreach Initiative included three core partners:

- | New England Forestry Foundation (NEFF)
- | American Forest Foundation (AFF)
- | MassConn Sustainable Forest Partnership (MassConn)

Ongoing collaboration among these organizations, with periodic participation from other partners, resulted in the initiative's successful pursuit of grants to keep the work going. Against the backdrop of an active two-state partnership of regional land trusts with deep forestry knowledge, the MassConn landscape of south-central Massachusetts and northeastern Connecticut realized investment of about \$3.7 million in private and public grants to various partner collaborations to pursue outreach, conservation and forestry outcomes over the course of the project.*

Among the grants, was an effort to create a shared MassConn Mapper data source, a project that updated GIS maps of protected open space and added some conservation easements that had never been tracked in past data layers.

There were approximately 174,000 acres of protected open space in the MassConn region in early 2016, and across the two-state, 38-town partnership, more than 5,000 additional acres have been protected since then (B. Hall, personal communication, September 26, 2019).

Below is a chart tracking outreach outcomes by the numbers, but there were numerous other benefits. The MassConn Woods Landowner Outreach Initiative:

- Road-tested the implementation of sustained landowner outreach in a high-priority landscape of remnant forest cores experiencing the threat of development from surrounding urban and suburban regions.
- Demonstrated the importance of repeated opportunities offered to high-priority landowners periodically over time as an effective onboarding strategy for fostering their deeper engagement with their land.
- Provided an outreach model for connecting landowners with foresters to assess vulnerability to climate change at the privately owned parcel level and providing climate-informed forestry advice.
- Tested messages for conserving land to benefit wildlife habitat, for leaving a legacy by conserving family lands, and for managing land to promote resilience to climate change.
- Supported national partner efforts to identify best practices for landowner outreach including piloting direct mail tactics and response tracking as well as integrating climate resilience mapping data with outreach strategy.
- Fostered investment in a maturing Regional Conservation Partnership (RCP) as a model for scaling up outreach expertise at the land trust and RCP level while strengthening partnerships at local and regional scales.



New Braintree, MA, photo by Lisa Hayden

The MassConn Woods Landowner Outreach Initiative succeeded in engaging 533 discrete, individual or family forest landowners owning a total of 31,387 acres, who participated in some form of outreach activity, including 20 percent of whom took the step of meeting with a natural resource professional to discuss their goals for their land encompassing 8,556 acres. Each of these numbers represents a person or a family with their own experience and perspective about their land. Some owners took part in multiple activities, but are only counted once each in the statistics below.*

MARKETING OUTREACH & OUTCOMES	Total individual landowners**	Total acres owned
Marketed to through direct mail outreach (some were contacted in more than one campaign)	3,704	289,054
Requested informational materials	228	12,685
Requested a site visit with a professional	150	12,014
Requested American Forest Foundation’s localized “Tips for Landowners” email newsletter	214	10,700
Attended an event or workshop co-hosted by NEFF/AFF/MassConn partnership (not counting owners who attended individual partner events)	186	8,390

*During this time period, the MassConn Sustainable Forest Partnership was also undertaking several compatible regional efforts to promote landowner engagement and increase the pace of land conservation, independent from but in coordination with the NEFF/AFF project, but for which results are not incorporated in this report.

**Landowners of 10 or more acres in the 38 towns of the MassConn region

PROJECT TIMELINE



2012-2013

Expert panel convened to help develop program concept

2013-2014

Baseline research conducted: Conservation Awareness Index, landowner focus groups, and Barriers and Benefits mailed survey

2014-2015

Initial active direct mail outreach phase in a 10-town, state-border pilot area with messaging about conservation and sustainable forestry



2016-2020

Active outreach incorporating climate change adaptation in concert with conservation and sustainable forestry outreach themes throughout the 38-town landscape

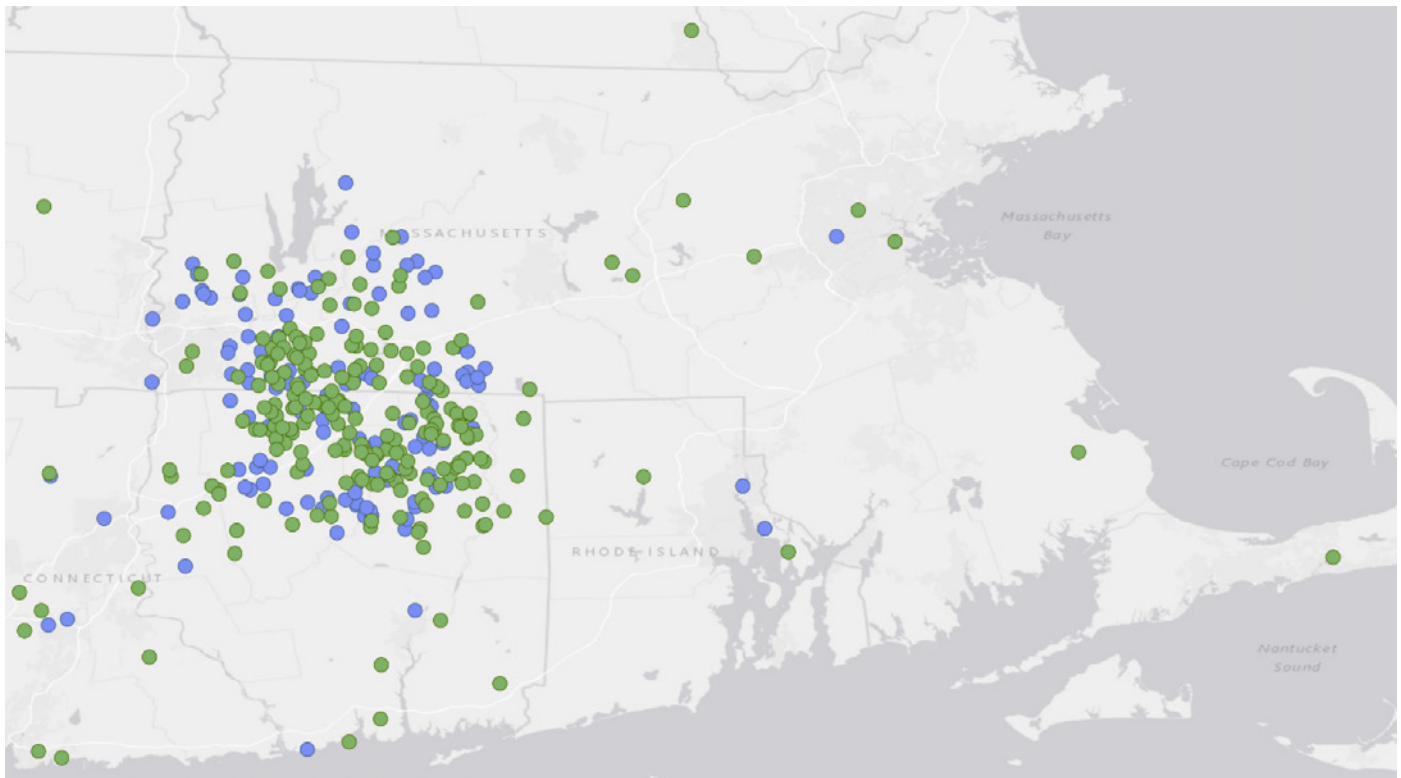
2018-2020

Sharing lessons and insights to advance and scale up landowner outreach in support of New England's vision for forest conservation and implementation of actions to solve the climate crisis



TOTAL LANDOWNER REQUESTS FROM MY MASSCONN WOODS LANDOWNER OUTREACH

By Mailing Address, 2014–2019, Courtesy of American Forest Foundation



Each of these points on the map represents a person or a family with their own experience and perspective about their land.

- Expert Visit Requests
- Information Requests

INTRODUCTION

21st Century Marketing for Land Conservation

The future of New England's forested landscape rests in the hands, hearts and minds of more than half a million individuals and families who own more than 13 million acres of forest (Butler, 2016). In particular, the decisions that the 215,000 owners of 10 or more acres make in the coming two or three decades will have a profound impact on whether many of our communities retain their rural, forested or agricultural heritage. When corporate ownership is included, fully 84 percent of New England's forests are in private ownership; the management of these private lands will determine whether the region's forests remain healthy and resilient enough to continue contributing the

tangible benefits of clean water, clean air, soil, wildlife habitat and forest products that our society counts on them for. Consequently, how we engage and support private forest landowners, provide them with information on available alternatives for their land, and structure public policy incentives to enable them to continue to maintain New England's forests as forests is a key set of questions.

More than five years ago, New England Forestry Foundation and partners embarked on an initiative to test alternative approaches to outreach, marketing and communications to the critical audience of family forest owners, aiming to improve



NEW ENGLAND FAMILY FOREST OWNERS OF 10+ ACRES National Woodland Owner Survey 2011–2013

State	Acres	Ownerships
CT	609,000	18,000*
MA	1,007,000	26,000
ME	5,307,000	86,000
NH	2,164,000	39,000
VT	2,521,000	40,000
RI	100,000	6,000
TOTAL	11,708,000	215,000

Source: Butler, 2016

* 2015 CT re-sampling of 2011 data found 17,000 families and individuals own about 600,000 acres (Tyrrell, 2015)

LEFT: NEFF's Goodell Morse Memorial Forest, Woodstock, CT, photo by Lisa Hayden

RIGHT: Landowner map courtesy of Wildlands and Woodlands

the effectiveness of land trust and conservation organization practice with this segment of the region's forest ownership.

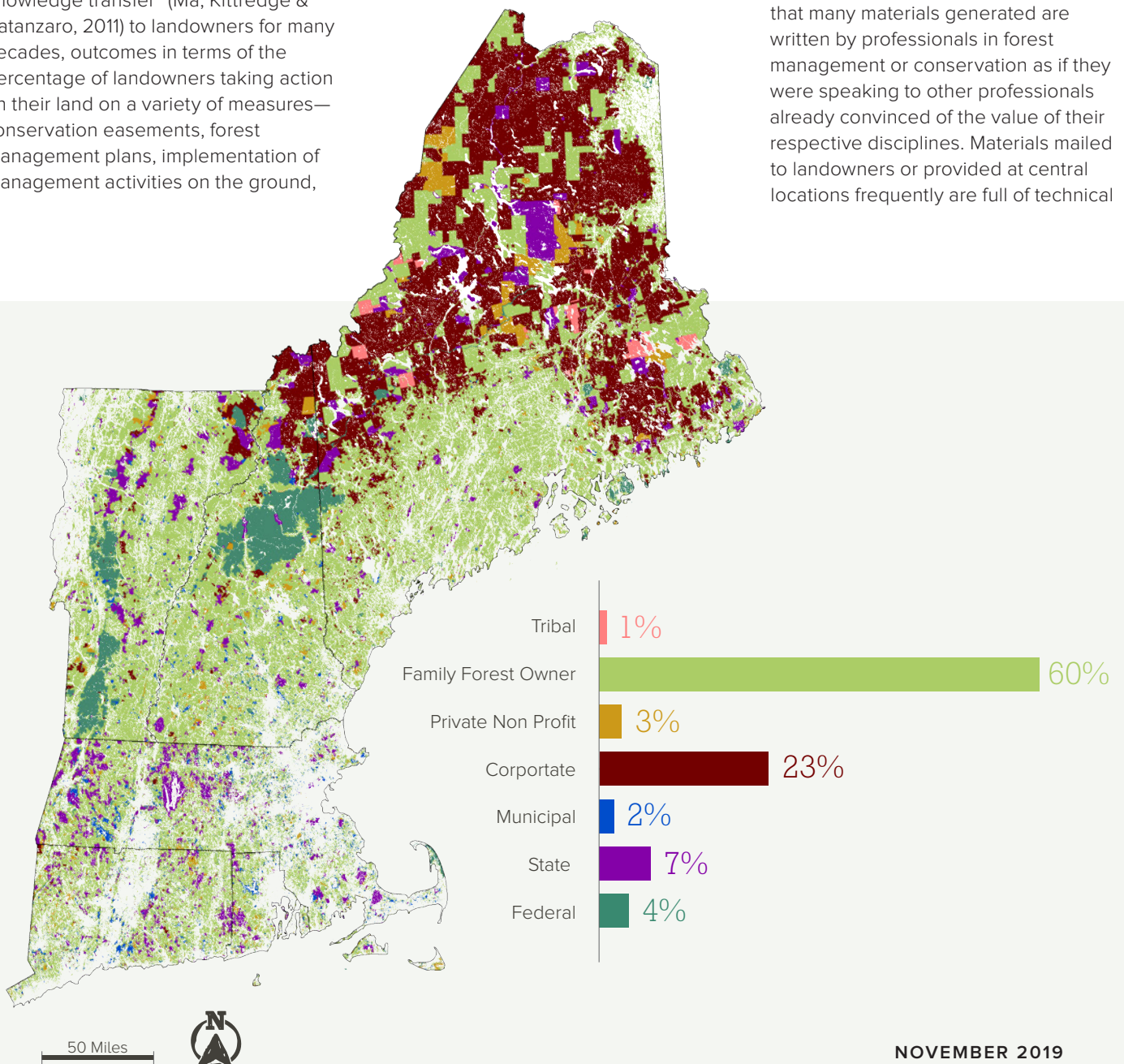
Why Do We Need a New Approach?

The data indicates that traditional methods of communicating with landowners have largely failed. While outreach and extension practitioners have been working on education and "knowledge transfer" (Ma, Kittredge & Catanzaro, 2011) to landowners for many decades, outcomes in terms of the percentage of landowners taking action on their land on a variety of measures—conservation easements, forest management plans, implementation of management activities on the ground,

etc.—hasn't changed much. In our pilot landscape of the MassConn Sustainable Forest Partnership, baseline research found that while close to half of owners had harvested timber, less than 25 percent worked with a professional forester to manage their land. About 65 percent of landowners surveyed could not identify a local land trust and nearly 80 percent could not identify a local forester. This low level of awareness is typical of national results.

"After decades of effort, the ability to communicate our forest management message in a way that will move nonindustrial private forest (NIPF) landowners to action continues to elude us," wrote Leslie B. Snyder and Steven H. Broderick in a 1992 journal. Twenty years later, much the same situation led to the creation of this outreach project.

One drawback to traditional outreach and non-targeted marketing efforts (often cited as producing response rates in the range of 2-3 percent) is that many materials generated are written by professionals in forest management or conservation as if they were speaking to other professionals already convinced of the value of their respective disciplines. Materials mailed to landowners or provided at central locations frequently are full of technical



terms and jargon, with preachy language about what people *should* do. Either the attitude or the language can cause landowners who do not share the same background or perspective to simply quit paying attention.

Another familiar phenomenon is that outreach events may be “preaching to the choir,” reaching the same active or motivated community members who always show up. We know that these landowners represent only a small fraction of the total landowner audience, and that there are others who could be interested in improved forest management or conservation, but lack the time or connections to engage. In past outreach, the forestry and conservation fields have not sufficiently considered how landowners view their land; what factors affect their decisions, such as life events, need for money,

their world view, and value systems; and who they consult when making those decisions, such as networks of family, friends, neighbors or other landowners they respect and trust.

Enter a New Solution

In late 2012, NEFF consulted with outreach academic experts as it developed the concept for a landowner outreach pilot program to launch the following year. NEFF and national partner American Forest Foundation (AFF) had received funding that year from the U.S. Forest Service to launch the work in a 10-town, pilot landscape within the 38-town region of host partner, the MassConn Sustainable Forest Partnership (MassConn), an existing collaboration of multi-town land trusts on both sides of the Massachusetts-Connecticut border. This region was chosen both because

of its location in a rapidly suburbanizing north-south corridor with significant still-intact forest cores, and long-standing professional relationships among key partners.

The active outreach phase of the **MassConn Woods Landowner Outreach Initiative**, as this project came to be known, coincided with a time when Opacum Land Trust hired an executive director whose role also included one day a week focused on further developing a Regional Conservation Partnership (RCP) for the MassConn landscape. Since fall 2014, NEFF has had a consultant or full-time coordinator actively road testing new strategies and tactics by actually “doing” outreach campaigns in partnership with MassConn, AFF, local land trusts and foresters on a pro-active, consistent basis, and to “learn by doing.”



Woodland resilience walk at The Fen, Woodstock, CT, photo by Lisa Hayden



Erythronium americanum, trout lily, photo by Leslie Duthie

The New England Context for Landowner Outreach

With limited public extension budgets for outreach, the process of building the pipeline of engaged owners can be daunting. Part of the challenge is that landowners are by nature a moving target of individuals owning land at any one time, with constant change due to death, inheritance, sale, acquisition and subdivision. And as forest fragmentation increases, their numbers are on the rise. As Kittredge (2004, p. 16) notes, “The audience is a moving target, because new owners enter the population and others leave ... The effort is further impeded by reduced agency budgets and growing demands for a host of services. The result is that effective outreach to family forest owners is becoming more difficult due to more of ‘them’ and fewer of ‘us’ to send the message.”

The clock is also ticking for privately owned large forest blocks as aging Boomer and earlier-generation landowners are reaching critical life decisions about the long-term care and ownership of their land. Some experts have called this demographic wave of anticipated land transfers “the silver tsunami,” a reference to the “graying” of a significant segment of landowners in the New England region.

Why bother reaching out to owners instead of waiting for them to contact us?

With limited time and resources, the conservation and forestry community needs to focus and prioritize our efforts to ensure we are investing wisely to protect the places on the landscape

The outreach initiative’s primary focus was on increasing the ecological social capital in the region—in other words, building shared appreciation for the value of forests among landowners—with ancillary outcomes to support the number of acres conserved and managed in MassConn’s strategic land protection plan. We aimed to interest previously unengaged woodland owners in becoming more actively involved with their land, to consider how segmentation of the owner audience might help accomplish outreach objectives, and to tap into informal social networks among landowners to share knowledge about conservation and forestry and remove barriers to action.

Through the partnership with AFF, a strong element of social marketing—informed by aspects of behavioral economics and social psychology—permeated the project’s outreach strategy, campaign tactics and follow-up evaluation. Social marketing (note, as distinct from social media) seeks to apply marketing concepts to influence behavior for the greater social good—not to get someone to buy something, but to get someone to “do something,” or to engage in behavior with desirable results, such as quitting smoking—or planning ahead to conserve their forest land (Morgan, 2017). In this project, social marketing was used to promote

individual actions to result in the outcome of forest conservation and sustainable forest management.

Ongoing collaboration among three core partners (NEFF, AFF and MassConn), against the backdrop of an actively innovating regional collaborative, contributed to the initiative’s successful pursuit of grants to keep the work going. Public and private funding supported outreach activities, such as woods walks, forums, professional visits, demonstration sites and workshops. By 2016, with a new private grant to incorporate forest climate adaptation, the outreach expanded to the full 38-town region and continued to evolve to meet partner needs and priorities, followed by a Forest Service grant, to conclude in 2020.

The project also benefitted from the synergy of being grounded in a region with a strong tradition of academic expertise in outreach and forest management through University of Massachusetts Extension, Yale School of Forestry & Environmental Studies’ Quiet Corner Initiative and the Sustaining Family Forests Initiative, and the 8,000-acre Norcross Wildlife Sanctuary in the heart of MassConn, as well as MassConn member land trusts, which in some cases were working to build memberships and relationships with local landowner leaders.

that will deliver the biggest ecological benefits to healthy ecosystems and human communities—not only for our current population, but for generations to follow. Typically this means we should be conserving large parcels of land in strategic locations, which can be defined by a range of criteria (i.e., large and connected forests, agricultural lands, wildlife habitat, drinking water sources, zones of high terrestrial climate resilience, etc.). We need to strategically reach out to the owners of these important lands to be sure we reach them. If we're too busy reacting, we may never get to protect some high-priority places.

With a warming world and changing climate, the stakes are even higher.

Natural, undeveloped lands provide a crucial part of the equation to solving the climate crisis, both in absorbing

carbon dioxide from human-caused emissions that are causing global warming, and in providing nature the breathing room to bounce back from disturbance and keep ecosystems functioning. Thus, reaching landowners who do not want their land to be subdivided for development about their options for conservation can help fight climate change. Another important dynamic is whether natural lands are left alone as nature or wilderness reserves, or managed with sustainable, Exemplary Forestry—New England needs landowners engaged in both options—while avoiding poor quality forest management, which can reduce carbon storage and forest health and degrade wildlife habitat, making the forest more vulnerable to future mortality from wind, insects, or drought.

Meanwhile, according to Harvard Forest's Wildlands and Woodlands report (W&W), all six New England

states are expected to experience forest loss at rates ranging from 21 percent to 63 percent by 2030. By 2060, 1.2 million acres of forest and farmland will be lost if current rates continue (Foster et al., 2017, p. 10). As larger properties of 100-200 acres become carved up into subdivisions, or 50- to 80-acre parcels, and then 15- to 30-acre, or even smaller house lots, the process of parcelization intensifies—and results in more and more landowners of ever-smaller parcels to reach with information about stewarding their land—and the likelihood of conservation or sustainable forest management on these properties diminishes.

In order to reach the ambitious goals of W&W to keep 70 percent of New England covered by forests by conserving 30 million acres by 2060 (10 percent as wildland reserves and the rest working forests), it will be imperative to utilize all of the skills and

Harvest hike at Morneau Farm, Opacum Land Trust, Dudley, MA, photo by Lisa Hayden



best approaches the conservation community has developed in order to save the largest possible connected forest lands for their multiple values and benefits. The forest conservation movement is now challenged to hone the tools we need to energize proactive outreach to high-priority ownerships while constantly priming the pump to interest new landowners and propel strategic landscape connections on the ground.

NEFF embarked on this outreach work to stock our toolbox, build our expertise in better communicating with this landowner audience, and more efficiently target our resources to conserve the forests of New England. The ability to effectively communicate with and mobilize this audience of private landowners holds the potential to transform the pace of conservation and improve the quality of forest management in our region. In this report, we share what we have learned from the MassConn Woods.



Landowners Are Critical Partners to NEFF

Land trusts do crucial work by identifying lands of ecological and social or recreational value, completing the acquisition of these parcels (through fee purchase, donation or conservation easement) and taking on the daunting responsibility of promising to manage and protect these places forever. But land trusts, such as NEFF and our local and regional partners, can't accomplish their important missions without a key player in this transaction—the property owner—who must for some reason love their land more than the monetary value or potential financial security it can provide if they decide to sell or subdivide it. The option to sell can be accomplished quickly and is easily understood, while the route to conservation is unfamiliar, time intensive,

and often complicated, requiring multiple potentially costly steps, as well as negotiation with an entity that must agree to the perpetual terms of the transaction.

Through NEFF's Heart of New England program, we seek to increase synergy among a triad of key audiences: private landowners, as well as foresters and land trusts. **Our core objective has been to help landowners understand their goals, how to meet them and who they need to enlist to make it happen** (assuring that appropriate local or regional land trust partners are consulted in pursuit of conservation, and that a professional forester is known and called upon when the decision is made to perform a timber

harvest or other forest management). NEFF's objective has been to share and disseminate learnings from this initiative through the network of 44 Regional Conservation Partnerships working to advance landscape-scale conservation and forestry across New England.

NEFF has successfully grown its portfolio to more than 29,000 acres of fee-owned lands in more than 145 Community Forests, most donated by families or individuals who wanted their land to stay wooded and be sustainably managed into the future. Another more than 1 million acres of land are still privately owned but protected by permanent conservation easements that NEFF annually monitors.

The Importance of Knowing Your Audience

A tenet from Marketing 101 is the importance of knowing your primary audience in order to best communicate with them. In conservation and forestry, successful marketing depends on getting to know the landowners in your geographic focus area for outreach so that you can craft messages that matter to them in the words they are receptive to hearing.

Although state and federal agricultural and forestry extension agencies have been working to reach landowners for many decades, efforts to apply the methods and tactics of consumer marketing to promote conservation and natural resource management is a relatively recent trend. An initial goal of the NEFF/AFF outreach initiative was to learn to communicate with landowners as proficiently as companies like Nike and Apple speak to their customers, in terms of understanding landowner motivations and desires, as well as the best channels—mail, email, phone, in-person, website or social media—for reaching them.

Many programs tend to skip the research step and just launch headlong into the outreach, but the initiative embarked on unusual in-depth social science to better understand the audience of landowners in the “MassConn” project area of south-central Massachusetts and northeastern Connecticut. Guided in part by results from focus groups, the partners conducted two large, quantitative surveys within the project’s 10-town pilot area in 2013-2014 to establish a

baseline of knowledge. The first of these surveys was the Conservation Awareness Index (CAI), a survey tool developed by researchers at University of Massachusetts-Amherst (UMass) and utilized in several other Northeast forested landscapes (Van Fleet, Kittredge, Butler & Catanzaro, 2012). The CAI survey was first applied in MassConn in fall 2013 and was conducted again in fall 2017.

A Tool for Gauging Awareness: The Conservation Awareness Index (CAI)

As part of the baseline, a state-specific questionnaire was sent in fall 2013 to 800 landowners in 10 towns in the MassConn region—seven of them in Connecticut and three in Massachusetts—using the Dillman (2009) method of survey design. There were 283 responses, for a strong response rate of 36.8 percent. The majority of respondents were male, over age 51, lived on their land and had a college degree or higher. On average, they owned 32 acres and had lived on the land for 24 years.

The 23-question CAI survey includes 16 questions organized into four sections of four questions each on the topics of current-use taxation, conservation easements (known as conservation restrictions in Massachusetts), timber

harvesting, and estate planning. These 16 questions are used to score each response on a scale from 1 to 4 with the highest possible conservation awareness represented by a score of 64. An additional seven demographic questions allow assessment of variation in awareness among groups.

The average 2013 Conservation Awareness score was 22.9 out of 64 points, according to researcher David Kittredge. Scores for awareness relating to conservation easements, current use, and estate planning ranged from 5.1 to 5.5 points out of a possible 16. Awareness of timber harvesting was slightly higher with an average of 7.1 points out of 16.

Only 6.7 percent of respondents could correctly or approximately identify a public service forester (individuals hired by the state of Connecticut or Massachusetts to provide information to private landowners), while less than six percent could identify an estate planning professional. Meanwhile, 35 percent of respondents could name or approximate the local land trust.

As 46 percent of respondents reported having sold timber, but only 22 percent could correctly or approximately name a private consulting forester, the survey suggests a considerable amount of timber is harvested from private lands in the MassConn area without professional forestry assistance.

Awareness Rises With Education and Acres Owned

The total CAI score was significantly related both to education level and the amount of land the respondent owned: the higher the education level of a respondent, the higher the total score; and the more acres owned, the higher the score.

Younger people were more likely to have higher CAI scores, and men were more likely to score higher than women, though it should be noted that the vast majority of respondents were male. Final scores were not correlated with tenure of ownership or distance between the respondent's permanent residence and the land owned.

Follow-Up 2017 CAI

NEFF, AFF and the MassConn partnership agreed to conduct a follow-up CAI survey in fall 2017 with grant funding as an evaluation measure in the hopes the tool would be a way to indicate changes in awareness. This survey to the same population as the 2013 CAI would be the first time the CAI survey tool had been re-deployed in the same landscape.

The 2017 sample included all ownerships that responded in 2013 plus an equal number of new, randomly selected landowners. Conducted from September to October 2017, with a standard four-wave Dillman method (2014), the second CAI was mailed to 1,053 private landowners across the 10 towns randomly selected from the tax rolls. A total of 261 responded, and after subtracting 23 undeliverable surveys, the response rate was 25 percent. With an average 2017 score of 23.1, the results showed very little change in the CAI scores despite a series of direct mail campaigns and events in the region over the intervening four years. The largest



AWARENESS BY COMMUNITY — 2013

Ashford, CT	17.9
Eastford, CT	22.1
Hampton, CT	26.3
Pomfret, CT	30.0
Stafford, CT	21.3
Union, CT	20.9
Woodstock, CT	28.9
Holland, MA	21.6
Monson, MA	23.2
Wales, MA	20.1

Town scores were calculated from the average of residents' scores in each community. Two neighboring Connecticut communities led the towns in conservation awareness: Pomfret had the highest score with 30 out of a possible 64 points, followed by Woodstock with 28.9 points (both communities have a history of municipal programs to purchase development rights of farm and forest land). Among the three Massachusetts communities surveyed, Monson had the highest score at 23.2.

increases between 2013 and 2017 were for tax programs and conservation easements, but these differences were not statistically significant. Looking just at those owners who responded in both 2013 and 2017, the scores fluctuated, but the average total CAI scores did not change significantly.

Researchers reported that very few landowners who were among the responders to the outreach initiative had also been captured in the 2017 CAI results, and this sparse overlap meant there was not a large enough sample size to separately analyze the scores of outreach responders.

In reviewing results, project partners concluded there were some mismatches in the scale of the follow-up CAI survey with the project design.

- Outreach mailings began in the same 10-town MassConn pilot region (seven Connecticut and three Massachusetts towns) as the first CAI was conducted. But as of 2016, the focal area for direct

mail promoting forester visits for forest resilience had shifted and expanded to include landowners in all 38 towns of the region, so outreach was dispersed over a wider area.

- Since fall 2015, direct mail offers were also segmented according to parcel size so owners with 25 or more acres received a complementary offer to meet with an expert, while owners of smaller parcels got offers for free information. Thus, outreach offers and mailings were not consistently applied to all eligible landowners in the landscape over the course of the project. Rather, campaign strategies were iterative and focused on getting different cohorts of unengaged landowners to take time out of their busy lives to fill out a reply card and pop it in the mail.
- The CAI questionnaire includes factual questions to test knowledge on four topics (current use, conservation easements, timber harvesting and estate planning) but outreach mailings were primarily geared toward getting owners to

respond—in order to learn more through materials or visits, not necessarily to educate them on the topics on the questionnaire. So, the project was not teaching to the CAI test.

A major lesson of this endeavor is the need to fully vet and match the scale of an assessment tool with the types of activities underway. Partners pursued some efforts at “surround-sound” community awareness building in 2015 (placement of post cards for landowner guides in locations such as Town Halls, coffee shops, libraries, etc.), but the project was unable to fund a significant public communications campaign alongside the one-on-one landowner engagement tactics. So perhaps it is not surprising that the targeted outreach approach in and of itself did not significantly move the needle on building conservation awareness among landowners who did not directly engage in project events or visits.

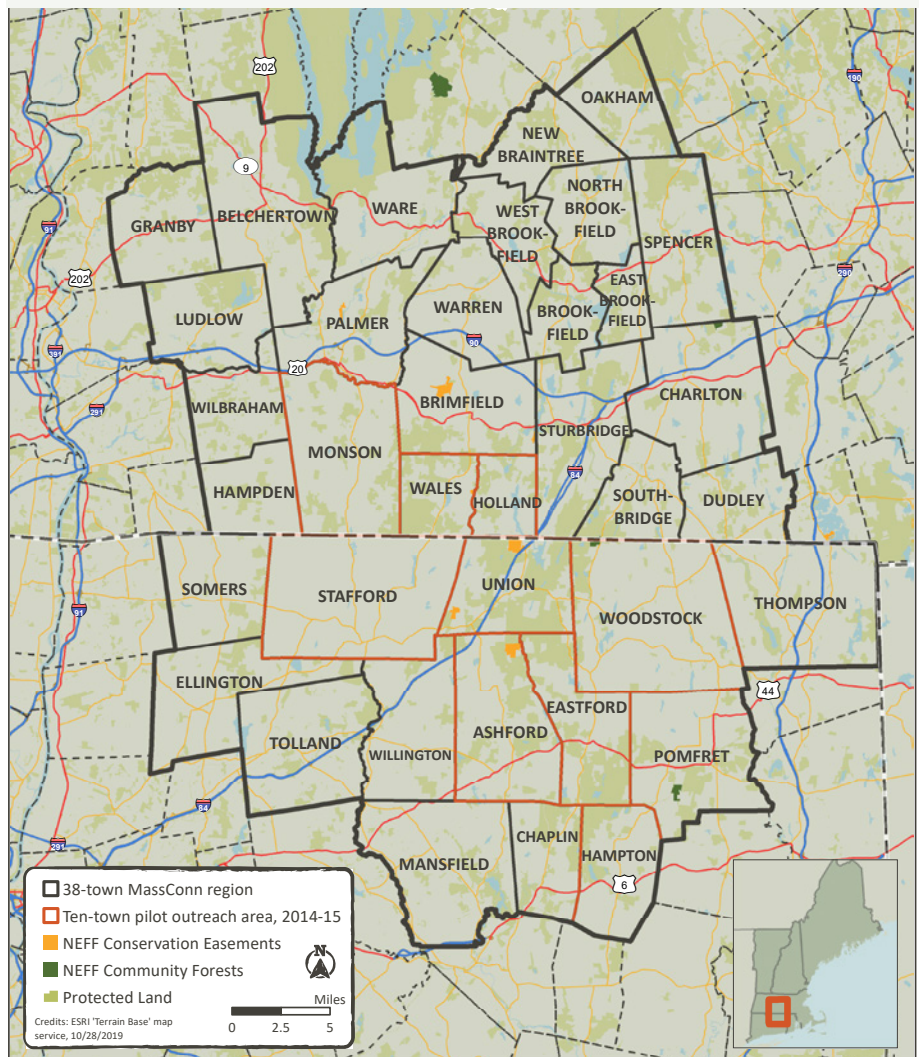
An open question is how would those owners who have participated in the MassConn Woods program score on the CAI questionnaire? The partners acknowledge that outreach can be challenging and time consuming, and hypothesize that more focused education endeavors may be required to increase knowledge among the landowners of a particular region on these detailed conservation topics. In the interim, we learned from experience that solid conservation/stewardship gains can be made by reaching those individual owners who, regardless of

their level of knowledge, are ready enough to engage with experts or to request resources to learn more. Counting just two landowners reached through MassConn outreach who are pursuing conservation agreements, more than 600 acres is in the pipeline for conservation. Dozens of other owners have enrolled in property tax reduction programs, connected with a forester to adopt a management plan for their land, or begun the process of applying for funding to manage their land.

Meanwhile, MassConn project participants report high satisfaction. In a 2016 follow-up email survey (41 percent response) to owners who received an expert visit, 40 percent said they planned to do one or more of the recommendations in the next 12 months and that they were more prepared to speak to family about the future of their land, while 100 percent said the visit met their needs “very” or “extremely” well.

LANDOWNER OUTREACH IN THE MASSCONN SUSTAINABLE FOREST PARTNERSHIP

The MassConn Sustainable Forest Partnership’s 38-town region includes 760,000 acres of which about 76 percent are forested and 23 percent are permanently conserved.



KEY TAKEAWAY

Even as projects are iterative and responsive to funding, it is important to keep monitoring objectives in mind. Consider including several meaningful measures for your outreach efforts, and keep activities calibrated with periodic monitoring endeavors.

Barrier and Benefits Survey

Focus Groups January 2014; Mailed Survey March 2014

The second survey used by the MassConn initiative was designed to identify landowner perceptions. Referred to as the Barrier and Benefits Survey, it was based on themes identified through three focus groups with a total of 24 landowners.

Placing woodland property owners in groups was challenging due to a lack of understanding of the themes of harvesting and conservation easements. However, the first two groups were mainly owners who had not harvested timber nor conserved their land (although some were enrolled in Massachusetts Chapter 61 or Connecticut PA 490 programs for reducing property taxes). The third group consisted of participants who had harvested timber as well as a few who placed conservation restrictions on their properties.

Focus group participants were very concerned about taking care of their woods and feared loss of their woods to invasive plants and pests, storms, and theft (such as stealing stone walls). They enjoyed the benefits of recreation, peace and quiet, wildlife habitat and heating fuel from owning their land.

The following clear themes emerged from the three discussion groups to inform the Barrier and Benefit Survey (Action Research, July 2014, p. 4-5).

PRESERVATION

Woodland property owners were very concerned about keeping development from threatening the region. Owners had strong connections to the land, and some had long family history there.

CONTROL

Woodland property owners communicated a strong need to maintain control over changes and activities that occur on their properties.

RESPONSIBILITY FOR WOODS

Woodland property owners take responsibility for maintaining their woods. Cleaning-up was viewed as an essential activity in order to enjoy, maintain the health of, and reap the rewards of their woods (i.e., firewood).

RESPONSIBILITY TO THE REGION

Woodland property owners communicated a strong sense of responsibility to their neighbors, community, and the overall region. Several were very aware of the need to maintain large areas of woodlands in order to maintain plant and wildlife systems. A couple of participants stated that water resources on their land were integral to the quality of water in the region.

HEALTH

Woodland property owners are very concerned with the health of their woods. All of the participants stated that they had gained knowledge over the years from reaching out to family and friends, agencies and organizations seeking knowledge in order to improve the health of their woods.

HARVESTING

Woodland property owners related harvesting to the health and improvement of their woods. Financial gain was communicated more as insurance if needed, but not the focus of harvesting activities.

- **Selective cutting** – the cutting of dead or diseased trees by property owners was viewed as a harvesting activity that improved the woods.
- **Logging** – these property owners associated the term “logging” with commercial harvesting.
- **Distrust** – these property owners have a high-level of distrust in anyone with a chainsaw.

CONSERVING

Woodland property owners viewed the Chapter 61 and PA 490 programs as tax incentive programs. Conservation restrictions (permanent) were associated with constraints, as well as protection.

Wild blue phlox *divaricata*, photo by Leslie Duthie



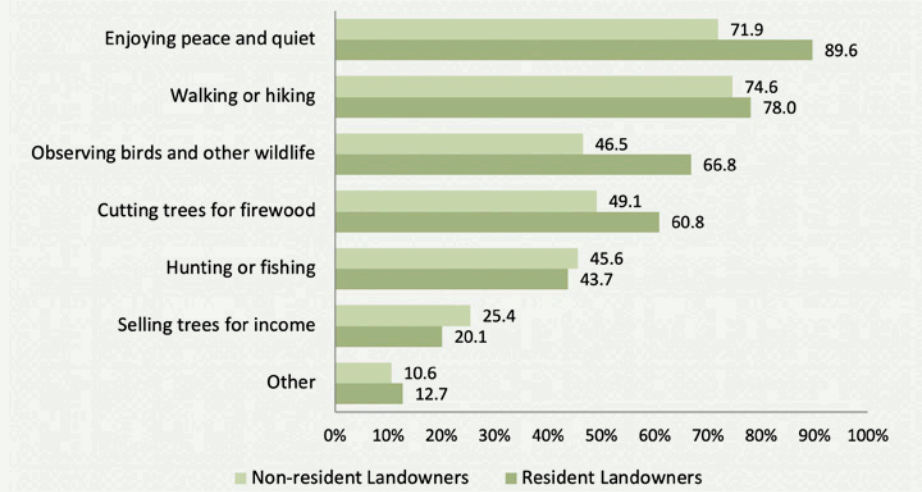
Gauging Perceived Barriers and Benefits of the MassConn Landowner Audience

The goal of a second mailed survey to a different MassConn landowner population than the CAI was to identify perceived Barriers and Benefits among woodland owners to 1) placing a conservation easement or restriction on all or part of their property, and, 2) managing their woods by harvesting timber with the use of a professional forester.

Mailed to 1,200 woodland property owners of 10 or more acres in 10 MassConn pilot towns, this survey was conducted by Action Research for American Forest Foundation and NEFF. Owners were selected at random from tax roll and a CentraForce marketing database, excluding those who were included in the previous CAI survey sample. (Sample size was determined assuming an estimated population of 4,550 landowners with 10 to 75 acres in the ten towns representing the Norcross Wildlife Sanctuary region: Wales, Monson and Holland, in Massachusetts, and Stafford, Union, Woodstock, Pomfret, Hampton, Eastford and Ashford, in Connecticut.)

Results from 392 landowners who returned surveys between March 24 and May 6, 2014 (+/- 4.56 percent at 95 percent confidence interval), were counted, resulting in a 36 percent response rate (among 1,101 owners who remained in the sample after removing invalid addresses, deceased owners, and those who did not own wooded land).

USES FOR WOODED LAND (N=389)



Key Findings of MassConn Barriers and Benefits Mail Survey

March – May 2014

CONSERVATION EASEMENTS

15% of surveyed owners currently have a conservation easement (or restriction)

33% not at all interested (knowledge was low)

6% very interested (women & those with post-graduate degrees more favorable toward easements)

“CURRENT-USE” PROGRAMS

50% in a “current-use” program (state programs that reduce property tax for lands maintained as open space, farmland or forest)

34% not at all interested; greatest concern – the program would limit how heirs could use their land

10% very interested; levels of knowledge among those not enrolled were low

TOP ACTIVITY: MAINTAINING HABITAT FOR WILDLIFE

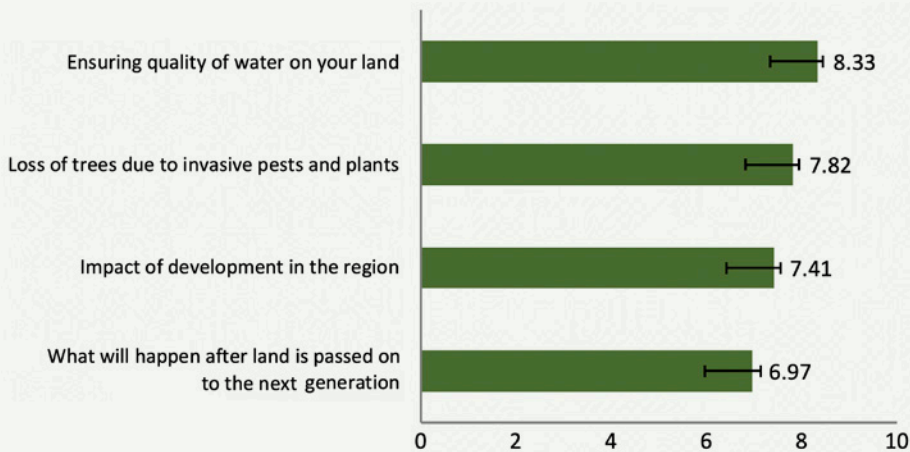
PROFESSIONAL FORESTERS

Barriers to using a professional forester were low, but a substantial proportion of respondents did not know if using a forester would be expensive or whether they would get a higher price for their trees by using one.

Owners saw benefits to using a forester, especially if they had worked with one (benefits for *health* and *appearance* of the land were rated most highly).

Those who had not yet used a forester did not see financial benefits to doing so.

MEAN RATINGS FOR LANDOWNER CONCERNS



Tree stump, Sturbridge, MA, photo by Lisa Hayden

HARVESTING

65% of those who live on their land have never harvested (their land is used primarily for enjoyment).

The biggest barrier for those who had not harvested is that logging would leave a mess for them to clean up.

RECEIVING INFORMATION

The Barrier and Benefits survey also included questions about how owners prefer to receive information. The preferred resource for most landowners was a website created for their area—and this finding, combined with AFF's national experience in branding a regional identity for outreach projects, resulted in partners creating the **MyMassConnWoods.org** website in 2015. Other findings about preferences included:

Family members and other landowners were consulted most often.

Those who already consulted with other landowners were more interested in networking with their peers.

There were slight differences in resident versus absentee landowners: residents were more likely to seek information from other owners, the internet, and government or non-profit forestry experts, while non-residents were more likely to consult family members.

Those who learned by reading or consulting forestry experts were more interested in a workshop, and women were more interested in a workshop than men.

Those who used the internet for information were more interested in all potential resources than were those who did not.

The responses from the information preferences section were very helpful in understanding gaps in knowledge and helping focus content when planning campaigns. Partners decided to focus the first campaign around a robust offer of information—a free book about forestry and conservation aimed at the intended woodland owner audience titled, “More Than a Woodlot: Getting the Most From Your Family Forest” by Stephen Long.

Academic researchers have also found differences in information preferences among generational age groups of owners. Younger generations are more likely to prefer receiving information and advice through the internet, from written materials, and from talking to someone or having someone visit their land. Older generations are more likely to say they do not want or need information or advice (Butler, S.M., Butler, & Markowski-Lindsay, 2017, p. 13).



A Backwards Looking Glance: Who Is the Average MassConn Landowner?

Audience research helped the project partners craft outreach strategies. Referring to research that identified four main typologies of woodland owners (Butler, B.J. et al., 2007), project planners proposed focusing on Woodland Retreat and/or Working the Land owners, though Supplemental Income and Uninvolved landowners might be captured incidentally.

AFF also developed a “backwards-looking glance” or profile of the typical MassConn landowner based on the surveys, demographic, tax roll and available marketing data, described below:



WHAT DO WE KNOW? MASSCONN LANDOWNER PROFILE/TYOLOGY

Caucasian male with a college degree living in CT.

Married with two children anxiously awaiting your first grandchild.

61 years old and can't wait to retire from your professional career.

Own 30 acres that you purchased when you and your wife got married and built your home on it. Love the peace and quiet of your home.

Land has woods that you cut periodically for firewood to heat your home in the winter, but that is your extent of land management.

This description echoes results of the National Woodland Owner Survey (NWOS) from a national audience, which finds the majority of owners are male, older, and have not typically been very

active in pursuing timber harvesting or other proactive management of their land. “The average age of family forest landowners in the United States is 63 years, with 43% of these landowners older than 65 years and more than 18% of these landowners 75 years or older ... The landowners 65 years or older own almost 50% of the family forest-owned acreage in the country” (Butler, S.M. et al., 2017, p. 2).

Gender and Other Segments of the Landowner Audience

What is less obvious from the statistics is the role and influence of female woodland owners, who often may not be the ones filling out the owner surveys (because the survey asks for demographic information for the owner who makes most of the decisions about the land, and the property may be in the husband's name) (Butler, B.J. et al., 2007, p. 351). Whether or not they are co-owners, the wife may in some cases be more interested in the woodland property and its future.

Anecdotally, some of the most engaged owners within the MassConn outreach work, have been women, each with their own individual story and history of how she became a woodland owner, and each extremely passionate about their land (see owner profiles, Chapter 5).

Exciting and promising developments in the outreach field are now focusing on women as a somewhat forgotten and neglected cohort among the landowner audience. The Women Owning Woodlands (WOW) network (**WomenOwningWoodlands.net**) has an active list serve in which conservation and forestry extension practitioners from around the country can share information about how to conduct outreach and social events for female owners, create informal networks to interest

them in learning from the stories of other women, and keep them engaged in proactive decisions about their land.

Foundational work in applying principles from consumer marketing to the field of conservation has been done over the past decade by Yale School of Forestry and Environmental Studies, Sustaining Family Forests Initiative through the TELE program or (Tools for Engaging Landowners Effectively), which has conducted 1-2 day workshops with conservation organizations around the country to assist them to think through messaging in support of their projects' strategic outcomes.

Seminal research findings in 2007 based on landowner attitudes from respondents to the 2002-2004 National Woodland Owner Survey identified four groups of landowners to whom social marketing and outreach programs can be tailored (Butler, B.J. et al. 2007):

WOODLAND RETREAT

A plurality of owners, about 40 percent, who in general live on their land and are likely to list aesthetics and privacy as the most important reasons for owning their forest land.

WORKING THE LAND

About 22 percent, interested in multiple use and benefits (scenic, recreational, financial).

SUPPLEMENTAL INCOME

About 15 percent, the most active group who are likely to have harvested trees, participated in cost-share and have an easement, and on average who own larger parcels.

READY TO SELL

Sometimes referred to as Uninvolved owners—about 23 percent, were least likely to rate any ownership objectives highly, and were the oldest and more likely to be absentee owners.

The MassConn project initially had an objective to apply consumer-marketing data to segment the landowner audience according to a variety of interest areas (such as hunting, gardening, environmental interest, birders, etc.), but based on consultation with a network of partners who were attempting similar tests, this approach was not pursued.

AFF-affiliated outreach projects in the Driftless region of the Midwest and the Piney Woods of Mississippi had attempted to create smaller sub-segments of owners based on purchased marketing data or “appends” to cross-reference with the four TELE typologies of woodland owners, but it appeared that the bulk of prospect landowners were falling into the TELE “Woodland Retreat” category and the sub-segments were not significant predictors of response. AFF (in consultation with Brett J. Butler who implements the NWOS) ultimately opted not to pursue that aspect of the outreach testing in MassConn. However, additional attempts to conduct A/B message testing with segments of the

Woodland Retreat audience, or the other owner typologies, may still prove interesting.

The group of Woodland Retreat owners nonetheless provides enormous potential for outreach focus, because they have among the lowest rates of desired land management actions (such as hiring a forester, having a management plan or using an easement to conserve their land)—lower than the Working the Land types and those who tend to own their land for investment purposes or supplemental income. Only the “Uninvolved owners” who are typically too busy or otherwise uninterested in their land have lower rates of pursuing good stewardship actions as listed above. TELE advises practitioners to think about one specific audience segment when crafting an outreach message—much like baiting a hook—and to worry less about reaching that specific segment. The thinking is that if it is an authentic message, it will be effective for that prime audience, as well as having positive spillover effects for all landowners who hear it (Sustaining Family Forests Initiative, 2018).



Union, CT, photo by Lisa Hayden

The MassConn Experience

The MassConn outreach initiative started as a pilot program in a 10-town, two-state limited geography (totaling about 2,500 landowners before list cleaning). The partners—NEFF, AFF and the MassConn Sustainable Forest Partnership—worked as a project team to iteratively plot campaign strategies, messaging and follow-up to responding landowners, focusing at first on education about conservation, including easements, and sustainable forestry. Conducting a series of direct mail campaigns offering information and expert visits, NEFF and partners have been building a pipeline of engaged landowners and contributing to conservation gains in the region—an important north-south wildlife movement corridor from northeastern Connecticut towards the Quabbin Reservoir and on to northern New England.

Events and follow-up tactics were planned to supplement the mailings, which needed to be strategically timed

about every six months in order not to inundate landowners with too many appeals in their mailboxes. After the first two years of active outreach and three direct mail campaigns of three touches each—a “touch” being an individual mailer within a campaign that a landowner receives—all of the owners in the original 10-town landscape were reached at least once with a targeted marketing campaign offering either information or a visit from a land trust or forester. At the conclusion of the first two years of active outreach, more than 220 owners or about 10 percent of the target audience had participated in some way (received information, had a visit, attended a walk or event, or signed up for email Tips—and many had engaged in multiple ways).

A previous grant to four Regional Conservation Partnerships (RCPs), led by Highstead (including NEFF through the Taconics Partnership), included

TELE training for practitioners that emphasized the recent findings that landowners have their own lexicon that should be echoed in outreach materials (such as “woods” and “woodlands” as opposed to “forests.”) (Andrejczyk, Butler, Tyrrell, & Langer, January 2016). Attempting to build on this previous outreach theme and activity within the landscape, the NEFF/AFF/MassConn partners re-used a headline from prior partnership mailings: “*You Love Your Woods – What’s Their Future?*” This theme applied to conservation-based estate planning, and more recently has also been relevant to managing woodlands for resilience against climate change.

By 2015, the local MassConn partnership Steering Committee was ready to embrace the AFF proposal to begin branding the regional outreach effort in a way that would resonate with area landowners. A naming contest was conducted through email “Tips for Landowners,” giving owners the chance to vote for the regional identity (among choices like “Quabbin to Quiet Corner,” “MassConn Central Highlands,” and “Quinebaug to Quabbin Woods & Valleys.” With many owners supporting the original MassConn identity as much as any of the new iterations, the name *My MassConn Woods* was selected for the multi-partner outreach initiative.

This step also represented a maturing collaboration as the partners were willing to forego maintaining their own organizational identities and instead embraced the joint regional identity. The existing logo (of a tree with the canopy consisting of all of the MassConn towns)



MassConn Woodland Ambassador walk, Monson, MA, photo by Ed Hood

was refreshed with brighter blue and green contrasting colors.

AFF's findings so far have indicated that the inclusion of one or more logos on mailers do not indicate a higher or lower response rate, but are very important in the building of long-term brand trust. Having one overarching partnership logo simplifies the design of mailers, but must be balanced with the legitimacy and name recognition of the entity. More well-known local or larger entities can lend legitimacy in the early phases of a partnership, but if the outreach can be sustained, the collaborative logo can come to generate its own respect as it becomes more recognized through

repeated interactions with owners through mailings, email messages and hosting of events in the communities.

Campaigns were accompanied by twice-monthly tips emails for landowners who opted in, providing another marketing channel to relay messages repeatedly. Meanwhile, My MassConn Woods sponsored hikes and events featuring peers and experts to continue building engagement opportunities. Events were frequently promoted with fliers posted at community hot spots to create "surround-sound" communications and amplify core messages through existing social networks. In some campaigns,

"social norming" messages were used, such as "your neighbors have already taken advantage of a chance to meet with a forester for free."

Priming With Information as a Long-Term Engagement Tactic

NEFF's earliest outreach campaigns, crafted with AFF and MassConn and focused broadly on themes of conservation and sustainable forestry, had success in following an information offer with a visit offer. In fall 2014, 121 owners responded to receive a free book—with 72 responding to a wildlife message for the book, versus 49 raising their hand from a conservation/legacy message.

The following spring 2015, about six months later, the 113 responding owners with land within the defined project towns were offered a free visit with a "land protection specialist." As a result, 10 owners (about 9 percent) responded to the offer to meet with someone to discuss goals for their land and potential conservation options, with subsequent referral to forestry resources or current use programs, depending on their individual needs. This was not a post card but a simple letter from the partners with the message: "hope you enjoyed reading the free book over the winter...this spring how about meeting with someone to discuss your goals for your land?"

Illustrating the "word of mouth" social networks that exist within the landowner audience, it appears that some post cards were handed off to friends or family, because three of the cards for the fall 2014 free book offer were actually returned from out of state (two from Stowe, VT, one from Antrim, NH) and a handful from towns outside the project area.



SERIES OF PROACTIVE DIRECT MAIL CAMPAIGNS

Fall 2014: offer of free *More Than a Woodlot* book (about 12 percent response)

- First campaign mailed to 929 people after undeliverables
- Direct mail conducted Aug – Sept 2014
- Intro letter and three waves of post cards offering *More Than a Woodlot: Getting the Most From Your Family Forest*, a Northern Woodlands book by Stephen Long, on forest management
- 113 landowners from focus area responded (121 counting out-of-area responses)
- 59 email addresses provided for twice-a-month "Tips for Landowners" (33-53% open rates)
- Respondents own 6,073 acres, at average size of 57 acres

A/B Message Testing

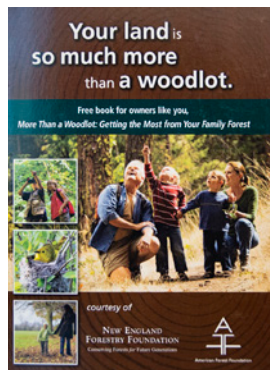
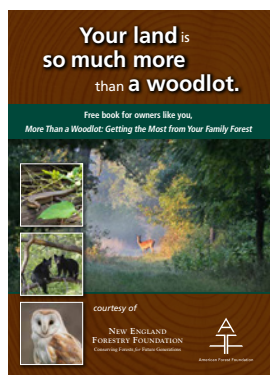
Mailing list was randomly split with half receiving a wildlife message and half receiving a conservation or family legacy message.



Wildlife: about 60% percent of total responders
"...private woodlands have incredible value in supporting the wildlife you love..."



Conservation/Legacy: about 40% of total responders
"...private woodlands have incredible value...they preserve our region's 'New England charm'... serve as a reminder of your family heritage..."





KEY TAKEAWAY

The partners' conclusion is that priming with information can be a useful tactic if your project has the time (six months to a year or more), and the budget, for a series of mailings that can build trust and familiarity with your project or partners, and engagement with landowners over time.

CAVEAT

The information that is offered must be useful. Surveys to the owners who received the book found that it was deemed very accessible and relevant as a general education resource. One owner commented that he “read it from cover to cover.”

A Word About Response Rates

Outreach practitioners have learned that different types of offers generate different levels of response. Gauging from the MassConn experience, and from the experience of various U.S. projects partnering with the American Forest Foundation “Community of Practice,” direct mail offers of a “free visit” with a professional (often a forester but sometimes a land protection specialist or other knowledgeable advisor for the landowner audience) typically garner a much lower response rate than offers of information. AFF estimates that visit offers typically result in a 3-5 percent response rate. Meanwhile, in general offers for information—i.e., “a free book” or a brochure, fact sheet or packet of published materials—generally results in larger response rates as high as 10-17 percent. We hypothesize that responding to receive information is a “lower barrier” offer. It takes much less time and commitment for the owner to ask for a brochure to show up in the mail box (which he or she may or may not eventually get to reading) than to take the step of agreeing to meet with someone in person.

In comparing outreach campaign participation rates in 10 AFF project landscapes, including the MassConn 2014 and 2015 direct mail campaigns, researchers found that owners who were offered a publication were on average 4.3 times more likely to participate than those offered a forester visit (Butler, Butler, Dennings & Knoot, 2018). The authors note that “offering a family forest owner a publication is much more likely to solicit a positive response than offering a site visit from a professional,” perhaps because the owner can learn at their own pace (Butler et al., 2018, p 10).

In addition to taking time out of personal schedules, the prospect of asking someone to visit them at their home or

Spring 2015 Direct Mail Campaign

A direct mail campaign was sent out in spring 2015 to an audience of 971 divided into four different audience buckets. The chart below details what each audience was offered and a themed message to test response rates.

“Free” Offers	Message	List Size*	Responses	Rate
Land Trust Expert Visit	Conservation	245	12	4.8%
Forester Visit	Wildlife	239	3	1.25%
Info: Handbook (PYCH)	Conservation	245	30	12.2%
Info: Handbook (PYCH)	Wildlife	242	39	16%



*Mail house list size after bad addresses removed from original total of 250 after first wave. Responders are removed from subsequent repeat mailings. Following AFF best practices, each owner usually gets each mailing 3 times in order to increase response rates.



property may be somewhat intimidating. It entails opening their private lives to a “so-called expert,” a willingness to engage in conversation and perhaps even admitting to themselves a lack of knowledge or confidence, and then having to share that vulnerability with outsiders. If the expert is from the government, this may cause additional apprehension for some owners who may not fully trust federal or state agencies.

Despite the promise of priming with info, the “cold” visit offer for the land trust specialist resulted in a similar number of responders (12) without the six-month lead time, indicating that a well-crafted message may produce solid enough results—particularly if you don’t have the luxury of time to complete an introductory informational offer.

The cold offer of a land trust visit or “land protection specialist,” in spring 2015 garnered a much higher response rate than the cold offer for a visit with a “forester.” The land trust representative visit offer (~4.8 percent response) had a far higher response than that for the forester visit (1.25 percent in line with traditional marketing rates). Even when using the generally high-performing wildlife message (because of the benefits to wildlife from active management), the forester visit offer performed poorly. We concluded that owners did not fully understand what a forester does, and the visit message did not include enough detail about how landowners would benefit, and thus, the offer to meet with a forester was perhaps not compelling enough. It seemed that education about the role of a forester was missing.

Later, climate-nuanced messages performed better when we tried using the term “natural resource professional” instead of “forester,” an attempt to encompass foresters’ broad knowledge of tree species, as well as many plant and animal species that benefit from management practices. We also

included a quote from an experienced landowner about why it is important to work with a forester as an important advisor. This kind of analysis, evaluation and questioning of the effectiveness of messages was common throughout the project, and was generally followed by an attempt to make adjustments in response to learnings.

Evaluation of Outreach Material Effectiveness

The MassConn project was one of the earliest AFF outreach initiatives, which have now grown to more than three dozen projects in significant forested regions across the country. AFF uses response rates to landowner outreach efforts across the country to gain lessons around landowner response to general categories of outreach appeals.

Testing the effectiveness of various outreach methods is a laborious process that entails tracking the details of outreach campaigns, such as the number of addresses that an appeal is mailed to, the number of undeliverable or bad addresses to which the message is never received, and ultimately the number of responders that you hear back from. While it takes pre-planning and high attention to detail to keep record of specific responses, it is ultimately worthwhile because it allows the program to reach more landowners, more cost-effectively.

The NEFF/MassConn Woods project was one of a handful of prototype initiatives that helped AFF to test the nuts and bolts of outreach logistics and planning protocol, including testing an early iteration of a database for tracking landowners who have been marketed to, their responses and eventual action at the parcel level, even after land ownership may change hands. This landowner engagement database has enabled the project to track what marketing material landowners receive and when they respond, in order to

gain lessons around how and when landowners typically respond. Whichever tracking system is used, it is important that it has the ability to keep track of landowner interactions, in order to allow better follow-up to owners months or years later.

A/B tests in which different messages are compared in the same mailing, while attempting to hold other factors constant, can be very useful in indicating effectiveness of outreach activity. However, numerous factors may play into the effectiveness of a specific marketing piece (such as a particularly compelling photograph, for example). Therefore, it is critical that such tests are designed to isolate one factor of interest (such as message, image, type of mailer, time of year, etc.) so that analysis allows us to isolate one contributing factor and draw conclusions that we can apply to future campaigns. When carefully designed and tracked, A/B testing can help answer key questions and offer valuable insights into the themes that best motivate your target audience to respond.



KEY TAKEAWAY

We want to boost our response rates as high as possible, but capacity is also an important consideration. We don’t want to generate more interest than we can respond to in a timely fashion. And when we are offering visits that must be scheduled by third parties—busy foresters or land trust volunteers—we need to be conservative in crafting campaigns and cognizant of the need to set up seamless referral systems in advance.

Patterns of Landowner Engagement Over Time

Connecticut
landowner
200 acres

A

Massachusetts
landowner
11 acres

B



2018

Applies for conservation easement funding, negotiations underway



2016

Develops forester plan for Massachusetts policy (Ch. 61) that saves landowners money on property taxes



2017

Adopts climate-informed management plan and begins work on controlling invasives



Spring 2015

Calls to respond to postcard offering a free visit from land protection specialist



August 2016

Attends Norcross climate-informed forestry walk
Signs up for free forester visit during event



February 2015

Attends Monson estate planning forum, where experts walked landowners through planning for the future of their land



November 2015

Attends workshop about conservation funding programs



November 2014

Attends Norcross woods walk about how forest management can benefit wildlife habitat



June 2015

Inquires about land trust visit card through neighbor and receives visit



Fall 2014

Returns postcard for free "More Than a Woodlot" book, an introduction to management

Assessing the Quality of Response: Are You Hitting Your Target Audience?

Even if a response rate doesn't break records, you might find that outreach is still worth the effort if you have successfully engaged owners of large or strategically located parcels that you were not in touch with previously. A smaller campaign in the fall of 2015 was geared more strategically by offering information—the landowner guide or *Place You Call Home* handbook—to owners of parcels between 10 and 40 acres, while reserving the visit offer for owners of larger parcels of 40 or more acres. Even though there was only about a 4 percent response rate for the visits, these were owners of significant parcels who were interested in exploring their options for conservation, so the results were deemed worth the effort.

Anecdotally, we have also begun to see familiar names of landowners begin to pop up repeatedly after completing a series of varied offers over the past four years. When cross-referencing lists of responders to individual campaigns, at least 24 owners who requested information first went on to receive a visit to their land (with a dozen of them receiving forest resilience visits through 2018). For example, a year after receiving a landowner's guide with articles about caring for their land, the owner accepts the offer of a free forester visit. The MassConn experience underscores the

observations of Butler et al. (2018) that an important topic for future research is whether acceptance of publications as a first step makes owners more likely to meet with professional foresters.

Another area where AFF has focused on experimenting is with the crucial work of following up with landowners after their initial response to encourage the landowner to take the next step in sustainable forest management. From small-group meetings to connect owners with cost-share resources, to specialized post-visit mailings and surveys, the AFF/NEFF/MassConn partnership has worked to move owners to the next logical step on their "landowner journey," be it applying for funding programs to pursue management or learning about the option of a conservation easement.

Learning From Landscapes Across the Country

AFF's Outreach National Community of Practice (COP)

The NEFF/MassConn Woods project was one of a handful of prototype initiatives that helped AFF to test the nuts and bolts of outreach logistics and planning protocol, including testing an early iteration of a database for tracking landowners who have been marketed to, their responses and eventual action at the parcel level, even after land ownership may change

hands. As of 2019, AFF has moved to a digital platform for woodland owner engagement and AFF-affiliated sites have grown to more than 40 projects in 20 states.

Particularly related to direct mail, MassConn message testing and road testing of tactics helped to focus AFF's landowner outreach expertise and some of these learnings have been included in AFF's Best Practices for Family/Individual Forest Owner Outreach Program binder for practitioners, produced for their initial Outreach Community of Practice conference in September 2018.

AFF Tips for Direct Mail

Use at least two "touches" for every campaign (a touch is a point of contact, in this case a repeated mailer). Three touches are ideal when time and funding allow.

Include pre-paid return mailers in all offers to landowners through a Business Reply Mail (BRM) account with the Post Office.

Tri-fold or quad-fold postcards are a useful tool to catch your audience's eye. A tear-off postage-paid return card with a form for the landowner to insert contact info can be included on one panel. Letters (including a reply card) also encourage a high rate, especially when the letter is written by another landowner who has participated in the program.

When possible, send the first mailer using first-class postage, so that bad addresses and undeliverable pieces will be sent back to the return address. This will allow you to calculate a true response rate based on the number of delivered mailers. List cleaning is time consuming, but by correcting outdated addresses, you can also save money on future mailings.

Personalize all contact when possible, particularly by including the owner's name(s) on the mailing address. Consider mail merging salutations in greeting lines.



KEY TAKEAWAY: REPEAT RESPONDERS OVER TIME

Information-requesting responders sometimes pop up years later on the list of owners who request a visit from a natural resources professional/forester. This finding underscores the importance of pursuing "sustaining strategies" to repeatedly reach out to landowners who express initial interest, providing additional opportunities for them to learn and engage with professionals and fellow landowners. Sustaining strategies like repeated direct mail or email notifications helps to *build brand trust* with the partnership brand while ensuring that landowners are given the opportunity to respond *when it is right for them*.

Broaching the Climate Conversation

In fundraising to support continued investment in the MassConn outreach initiative, NEFF was mindful of the increasing urgency of climate change threats to the forests of New England—and the world—and the interest of funders in this area. NEFF sought out and helped to connect partners open to incorporating parcel-level climate adaptation planning into landowner outreach, and by 2016 American Forest Foundation had won a successful two-year grant from the Wildlife Conservation Society for work with NEFF and local partners in the MassConn Woods 38-town, two-state geography.

GRANT ACTIVITIES AND OUTCOMES FOCUSED ON:

- 1 Engaging private landowners through forester parcel visits and demonstration site walks to understand the vulnerability of their woods to climate change;
- 2 Social marketing to help owners take the next steps to adopt practices to keep their woods healthy and resilient amid a changing climate.

This new source of funding for 2016-2017 built off the first 18 months of active outreach that had initially focused solely on conservation and sustainable forestry. At this phase, new partners joined the project: the Norcross Wildlife Sanctuary agreed to serve as a demonstration site and learning laboratory for foresters and landowners by incorporating climate-informed practices in two timber harvests on conserved lands and replacement of a culvert to accommodate more

intense precipitation events. The Forest Service's Northern Institute of Applied Climate Science (NIACS) provided support for the demonstration's on-the-ground adaptation work as well as training for professional foresters to work one-on-one with landowners to assess climate change vulnerability through the outreach project.

The partners created specific marketing products to address different target audiences. There was a deliberate two-tier communications process; while the primary audience was still the family forest landowner, the grant team first needed to prepare local consulting foresters who were participating as circuit riders to understand how to assess forest stands for climate change vulnerability and adaptation planning, as well as how to interact with landowners on the potentially controversial subject of global warming and how it is affecting forests.

At an early planning meeting, the team developed the concept of a site-level communication tool that would extract the forester's expertise about how a property may be vulnerable to climate change tailored to the landowner and their particular forest stands and site conditions. The idea for the leave-behind checklist of suggested forest adaptation practices was the brainchild of experienced forester Dan Donahue, who was at the time the Director of Conservation at Norcross and recognized the need for a simple tool to capture recommendations relevant to the site (that might be unfamiliar to the landowner) during or very soon after the conversation at the visit.



Eastern painted turtle

A team of three colleagues collaborated to draft the Checklist (from a larger menu of research-based forest adaptation approaches), along with an accompanying suite of communications and outreach materials to help accomplish the grant objectives: Maria Janowiak, Deputy Director of NIACS, provided climate science vetting; Christine Cadigan, from American Forest Foundation, contributed expertise with forestry and circuit rider programs; and Lisa Hayden, from NEFF, with a journalism/strategic communications background, brought experience in messaging to make climate change relevant to people's daily lives.

The team opted to experiment with a "carbonless" checklist form in triplicate so that a tear-off copy could be left with the landowner immediately, one kept by the forester and one returned to the grant project coordinator for tracking and follow-up with the owner six months

later to offer additional support to take next steps. (In practice, some of the foresters preferred to fill in a digital form to email to the owners within a day or two of the visit, especially if their hand writing was difficult to decipher. In reviewing the visit protocol with the forester team, some said filling out the form on the computer also allowed the professional time to reflect on the site and owner goals to provide more in-depth advice. However, if put aside, there is a risk of a delay in sending the information to the owner, and a potential loss of attention or interest by the owner to focus on the recommendations. As an additional evaluation measure, owners could be surveyed to determine whether they prefer the immediate feedback in writing at the end of the visit, or follow-up within a week, which also may serve as a near-term prompt to action.)

The MassConn Woods team also wanted to bolster the foresters' communications skills to broach the climate conversation as appropriate. One of the most important parts of a visit is listening to the landowner about their goals for their property—even if they aren't yet clear on what those goals are. This introductory conversation helps the forester get a read on where the owner is coming from, and sets the context for the most relevant visit topics to meet both the owner's most pressing needs and the grant objectives.

Many of the participating foresters intuitively understood or learned that it was not always necessary to engage in the overarching topic of climate change with all of the political baggage that subject might entail. Rather, the MassConn Woods grant team advises

finding common ground with the owner and only peripherally touching on the climate topic as most relevant at the site. An effective way to do so is delving into specific changes they may have seen or experienced on their property, such as stream washouts, erosion, or high wind damage as a way to steer the conversation toward practices the owner can adopt to promote forest resilience against future disruptions. For example, one event that really resonated with owners in the MassConn region is the October 29, 2011, early-season Nor'easter, which dumped heavy snow when leaves were still on the trees, weighing down limbs and causing extended power outages. Landowners remember that event because it was unusual—"weird weather" that resulted in a white Halloween, and lasting damage from half-broken branches left dangling.



Timber harvest at Whaleback Ridge demonstration site, Norcross Wildlife Sanctuary, photo by Lisa Hayden

New Tools to Help Landowners Understand Climate Risks to Their Land – and Take Steps to Promote Long-Term Resilience

 To access the MassConn Woods toolkit, visit forestadaptation.org/massconn

Climate Change & Our Forests: Guidance for Foresters and Land Managers

Climate science cheat sheet, including a chart from the Tree Atlas that projects what species will fare better or worse under anticipated climate impacts, for the professional forester to incorporate as adaptation guidance into their forest management planning, and refresh key concepts before landowner visits.

Keeping Your Woods Healthy Through the Years Ahead

Landowner-facing fact sheet explaining local climate change impacts already being observed in Southern New England, and how they can take steps to help their woodlands withstand the anticipated changes and disruptions.

Considerations for Your Woodlot


Checklist of site-appropriate adaptation strategies recommended by the forester, who fills out the sheet and leaves it with the landowner either at time of the visit or in follow-up communication. The list includes simple descriptions of sustainable forestry practices—such as protecting soil and water and promoting a diversity of tree species and ages—that become even more important with a changing climate. There is room below each practice for hand-written details. The information from the checklist vulnerability assessment can then be used to provide a climate-informed section of a forest management plan or as a start toward a more robust exercise for site-level adaptation planning with the NIACS Adaptation Workbook.

Site visit sheet

This grant project tracking form is filled out by the forester after the visit to allow project follow-up with the owner within three to six months to offer support, and potentially to pursue funding opportunities as appropriate, to implement the recommendations, or to help landowners pursue other goals for their land, such as conservation.

Climate Change & Our Forests

Guidance for Foresters and Land Managers



Forests are a defining feature of the landscape in “the MassConn Woods” of northeastern Connecticut and south central Massachusetts. These natural systems, so crucial to our history and current quality of life, provide many environmental, economic, and social benefits to the region.

These forests, primarily in private family or individual ownership, will increasingly be affected by a changing climate. Understanding these potential impacts is an important first step to sustaining healthy forests in the face of changing conditions.

THE CLIMATE HAS CHANGED
 The Earth’s climate is changing. Many trends have been tracked across the globe, some reaching back hundreds of thousands of years. Although the climate has always changed, the changes that have occurred over the past century are more profound than anything that has happened since the start of human civilization and have important effects on our current environment.


The average annual temperature in the area has risen more than 2°F since the late 1800s.^{1,2} Temperatures warmed in all seasons, with winter warming by more than 2°F. Temperature records show that warming has accelerated in recent decades.

Winter temperatures increased by more than 3°F since the turn of the last century, and heavy rainfall events have become more common.


Precipitation also increased during this period, ranging from increases of approximately 3 inches across most of Connecticut to more than 5.5 inches in central Massachusetts.³ The greatest increase in precipitation has been in the fall, with smaller increases during spring and summer. Extreme precipitation events have increased substantially, particularly over the past several decades.⁴

CHANGES WILL CONTINUE
 It’s impossible to predict exactly what will happen in the future, so global climate models can help us understand how the climate may react under various scenarios. There are many different models available and they provide an opportunity to understand the range of potential changes that may occur depending on the carbon-intensity of future energy sources.

Temperatures will increase
 Climate models agree that temperatures will increase across all seasons in the region over the next century. The projected increase in annual temperature ranges from 3 to 10°F by the end of the century, depending upon future scenarios.^{5,6} Growing seasons will continue to get longer as a result of warmer temperatures.



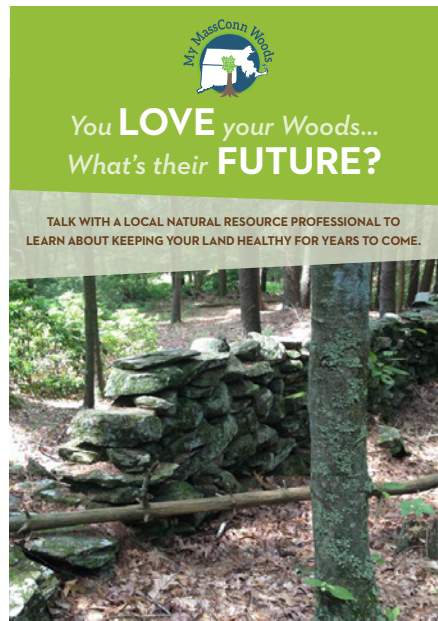
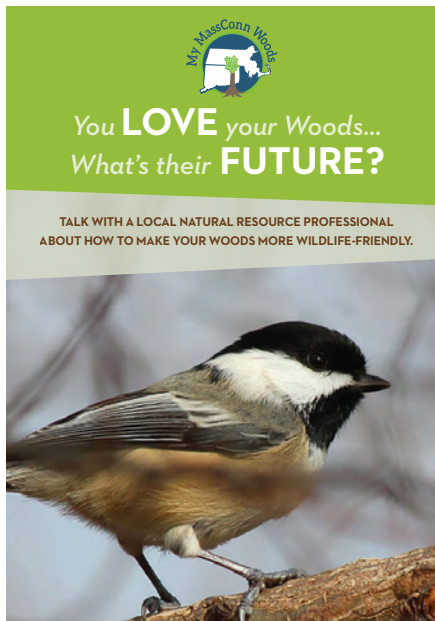
Considerations for Your Woodlot



The following are general recommendations to keep your woods healthy and able to adapt to changes into the future. **While all of these actions are important, the checked recommendations are most applicable to your woods and your situation.** To learn more, consult our fact sheet, consider working with a professional to implement these practices on the ground or visit our website at <http://mymassconnwoods.org/>.

Top Forest Stressors to Keep an Eye On	Extreme Weather Vulnerabilities

- Protect water and soils on your land
- Improve ability of your trees to resist bugs and disease
- Prevent and control non-native plants and weeds that threaten native plants and animals
- Manage damage to young trees from excessive deer browsing
- Prepare for big weather events by promoting strong, healthy trees in your woodlot
- Respond quickly after big disturbance events to help your woods bounce back
- Promote a diversity of tree species
- Promote a diversity of tree sizes
- Protect rare or sensitive plant & animal communities
- Consider how your current trees will react to future conditions and which tree species you might want to promote
- Monitor your woods and the effect of different management tactics



2016 – Free Forester Visit Offer (Wildlife Conservation Society grant)

Reaching and Engaging Owners on Climate

In promoting the visits to private owners, a series of three tri-fold mailers with a Business Reply Mail (BRM) pre-paid, tear-off response card were used, each with a different climate-related message.

As a result of the 2016 direct mail campaign, six NIACS-trained consulting foresters were dispatched to meet with owners for up to two hours, walk their land and discuss goals and suggested climate-informed management options. As a result of individualized follow-up by the project and the foresters, 16 of these landowners took additional actions on their land covering 1,679 acres, including adaptation plans, forest management plans and application for federal Natural Resources Conservation Service (NRCS) assistance for practices such as invasives treatment and thinning. This outreach requires numerous emails, phone calls and ongoing coordination to assist owners in achieving their goals, while incorporating adaptation to support forest health and resilience.

DIRECT MAIL

Direct mail to 613 MA, 424 CT owners of 30+ acres across 38 towns

OWNER VISITS

42 owner visits on 3,532 acres completed 2016-17 (combination of post card visit requests and event sign-ups)

GRANT OUTCOMES

16 climate-informed forest management plans on 1,679 acres, and silvicultural treatments on 3 parcels, 388 acres (two other owners had trees marked but harvests were delayed due to challenging wood markets)

In addition, 67 landowners responded to a 2017 follow-up Summer/Fall campaign in which non-responders from 2016 were offered a free “How-to guide from My MassConn Woods to learn about supporting a thriving woodland in the face of changing conditions.” Message testing from these information campaigns garnered the following response rates:

SUMMER 2017

Extreme Weather	33%
Disease	39%
Wildlife	27%

FALL 2017

Extreme Weather	25%
Disease/Pests	75%*

*At the time, parts of the MassConn region were experiencing defoliation of many oak and other trees due to a severe gypsy moth outbreak.

The MassConn partners took another opportunity to examine the tactic of “Priming With Information” during the WCS grant. We wondered if an offer of information first might boost response rates, but with a two-year window to accomplish forester visits, AFF and NEFF went out of the gate immediately in 2016 with a forester visit offer to keep on schedule. A relatively low 2 percent response resulted, but this pace was about all the six-person consultant forester corps could accommodate. In 2017, the MassConn Woods project re-sent mailers to “visit offer non-responders,” this time offering information packets. Even if folks did not take the 2016 offer to meet with someone, that first touch

may have still made an impression on some. There was a much higher response to the information packet offer including the climate adaptation landowner fact sheet, a UMass Forest Resilience brochure and The Place You Call Home guide (67 requests over summer and fall 2017). Because a new grant had been awarded by that point, the partners knew there would be an opportunity to reach these cohorts again to re-offer the forester visit, now that those owners had been primed with information.

Thanks to the three-year USDA Forest Service grant that New England Forestry Foundation received to further saturate outreach within MassConn and

expand to new areas in Connecticut and Massachusetts, climate-informed forestry visits will continue through June 2020 with a goal of 75 completed visits. Two NIACS workshops, one at UConn in 2018, and one at Audubon’s Elm Hill Wildlife Sanctuary in Brookfield, MA, in 2019, provided training on forest climate adaptation for about 35 foresters, promoting further integration of climate-informed silviculture among the forestry profession and the two state forestry agencies.

The MassConn Woods Landowner Outreach Initiative also combined the use of digital mapping data with the climate adaptation outreach strategy. Through funding from the Jesse B. Cox



Lichen on log, photo by Lisa Hayden

Charitable Trust, the MassConn Sustainable Forest Partnership created the MassConn Mapper tool, which combines spatial data with a series of ecological parameters, such as size of forest block, proximity to protected land and The Nature Conservancy's (TNC) terrestrial areas of high climate resilience, among others. In preparing the Forest Service grant mailings, NEFF, AFF and MassConn used the Mapper to pull the mailing list for the climate-informed forester visit offer from the top 40 percent of ownerships within the partnership's ecological priorities.

A follow-up climate resilience mini-campaign mailing in spring 2019 honed in on a neighborhood of landowners in a MassConn focal area (Emerald Forest Borderlands) on the state border of Southbridge, MA, and Woodstock, CT, which included zones of TNC's high climate resilience in a forested block of 30,000 acres, creating a north/south wildlife corridor. Climate-informed forester visits and grants for bird habitat management plans were promoted at events including a woods walk and estate planning forum in the Dudley/Southbridge area. Opacum Land Trust as host entity for the MassConn partnership will continue pursuing grants to fund conservation deals in this landscape.

DIRECT MAIL

Direct mail to 3,376 owners of 30+ acres in all 38 MassConn towns (2,035 never marketed to; 1,132 non-responders to past mailings; 209 previous responders)

OWNER VISITS

55 visits completed to date to owners of about 3,992 total acres through U.S. Forest Service grant

RESPONSE RATE

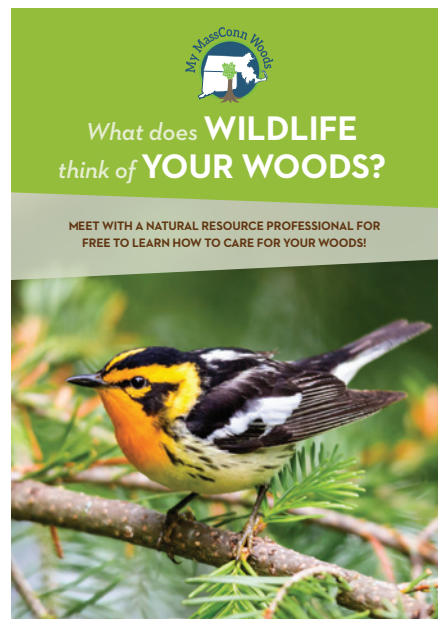
At a cost of 80 cents per mailed full-color piece (or \$1.60 per targeted owner), the campaign yielded about a 2.5 percent response rate*, but with a large mailing list, the hand-raisers in Fall 2018 were enough to keep consulting foresters who participated as grant circuit riders busy during a year when they were also in demand to help landowners cope with heavy tree damage from gypsy moth.

OUTCOMES TO DATE

Counting all grants, New England Forestry Foundation and MassConn Woods partners have completed a total of 97 forester climate-informed visits to landowners owning a total of 7,524 acres.

Both grants for climate-informed forestry outreach provided a portion of the salary for NEFF's Outreach Coordinator which allowed NEFF to continue the landowner outreach initiative with MassConn and AFF, while also providing follow-up to some owners who had engaged with the project earlier with interest in conservation. NEFF is now focused on expanding communications about climate-informed forest management to new high-priority focal areas, including the Berkshires, and The Last Green Valley of Connecticut and Massachusetts (part of which extends beyond the MassConn footprint).

*Despite best efforts, not all visit requests come to fruition. Some busy owners can be tough to reach when foresters call to schedule. Best practice is to contact the owner to schedule visits as promptly as possible.



2018 – Free Forester Visit Offer (Forest Service Landscape Scale Restoration grant)

Realizing Owner Goals: Support to Make a Plan



The ultimate objective of our outreach strategy is to spur woodland owners to take charge of decisions about their land based on their individual goals and interests, be they permanent conservation, or more active woodland management. A key step in the engagement process is a consultation with a forester or conservation professional who can provide one-on-one expertise tailored to the landowners' needs, which occurred for at least 122 owners who were tracked through the project (though others may have sought advice independently).

Among the outcomes of the multi-year MassConn Woods landowner engagement project are lists of several hundred prospective landowners for partner land trusts to follow. Some of these owners may have engaged many years ago and not yet taken action, but periodically continue to pursue new information when it is available. Other owners were newly engaged as a result of outreach mailings planned and implemented by NEFF and AFF in concert with the MassConn partnership, and then responded in one or more ways, to mailed offers, event invitations or signing up for periodic email tips.

The NEFF and MassConn Woods outreach initiative sought to provide the resources that owners need to be fully informed about their options. In some cases, My MassConn Woods has referred owners to an appropriate partner organization or agency to assist them to achieve the outcome they seek, whether it be pursuing permanent protection of their land

Patrick Smith shows walk guests a bird box he made at The Fen, Woodstock, CT, photo by Lisa Hayden

from development, a more active role in forest management, or other steps such as enrolling in current use to lower property taxes or wildlife habitat actions like controlling invasive plants.

On the Forest Management Track

Once a landowner has had a free forester visit, the outreach work isn't over. Perhaps the harder part is coordinating follow-up mailings, emails and phone calls to check in and offer assistance to help the owner take the next step. MassConn partners continue to follow up with owners who had climate-informed forestry visits to offer support and referral to funding sources or other agencies, seeking to propel forest management or stewardship plans for owners who do not already have them, and ultimately track on-the-ground action.

Throughout the project, partners worked to match owners with available funding sources. MassConn's participation in a Regional Conservation Partnership Program (RCPP) awarded from NRCS to the Southern New England Heritage Forest has created a new avenue for owners to pursue support for easements or management plans. Coordination continues with The Last Green Valley in Connecticut and Rhode Island Conservation District, partners in that effort, to promote and connect eligible private landowners to funding to offset management costs. So far, at least seven owners who had forester visits in 2018 were referred to apply in 2019 for RCPP bird habitat plans and practices. MassConn has funding for about 80 forest stewardship plans for bird habitat in Massachusetts, and follow-up to owners who responded to outreach continues, in an effort to connect them with this option as rolling application deadlines approach.



Stafford, CT, photo by Lisa Hayden

On the Conservation Track

The MassConn Woods outreach partners held two very successful estate-planning forums in Monson, MA, in February 2015, and Stafford, CT, in November 2015. Multiple partners working in the landscape came together to create a meaningful program using UMass's "Your Land, Your Legacy" materials (Catanzaro, Rasku & Sweetser Ferris, 2014) (recently revised to "Protecting Your Legacy"), including explanation by an attorney of how tools like easements work; personal stories from fellow landowners about their experiences pursuing conservation, touching on the challenges of reaching family decisions when not everyone agrees; and attendance by partners offering free resources to assist owners.

These forums were well attended by about 40 owners in Monson, and about 25 in Stafford, indicating that there is a need for this kind of workshop, particularly in rural communities. (The MassConn Steering Committee was

also simultaneously hosting a series of peer learning events as part of another grant in the northern reaches of the collaboration, in which additional estate planning forums and programs about Ch. 61, a state program that reduces enrolled owners' property taxes, were held in "the Brookfields," Palmer, Ware and other towns.)

About two dozen land trust or "land protection specialist" visits were conducted as part of the 2015 outreach, a handful of which have progressed into significant conservation projects with various land trust partners. However, the outreach project encountered a challenge when it became clear that a few of the land trusts within MassConn preferred not to accept conservation easements because of the challenges of annually monitoring easements. Instead, they were restricting the bulk of their activity to fee acquisition (in other words, becoming the property owner of conserved land rather than



the easement holder of extinguished development rights—a permanent legal liability). Thus, AFF’s goal of promoting conservation easements as a project outcome became more difficult to achieve when some of the land trusts in the focal area were not on board with promoting easements.




However, the sustained MassConn outreach efforts have helped to inspire some additional MassConn land trusts to consider pursuing grant proposals such as Forest Legacy and landscape-level projects, which can take enormous coordination among multiple partners to complete. As funding proposals to help purchase development rights or fund transaction costs simmer on the back burner, MassConn Woods grant-funded forester visits helped keep landowners engaged in thinking about the future of their land, and in a few cases helped to fund their adoption of climate-informed management plans as an interim step. Many say they would prefer their property not be developed, yet they would like to be paid something for the inherent value of their land, which can help to provide for heirs, particularly those who prefer to receive money from inheritance.

Meanwhile, across New England, conservation easements continue to represent an important and cost-effective land protection tool for a segment of private owners (often the retreat owners) who want to remain involved with their land. As the Wildlands & Woodlands report (Foster, et al., 2017, p. 12) notes, “Privately owned land now represents 40 percent of all the protected land in New England, a significant shift from the historical dominance by state and federal government ownerships. ... In the last decade, easements accounted for more than 70 percent of newly protected lands.”

Eliminating Barriers to Conservation: Research Underscores Importance of Landowner Estate Planning

The area of conservation-based estate planning by landowners has received relatively little study, (Catanzaro, Markowski-Lindsay, Milman, & Kittredge, 2014). Recent research led by UMass has found encouraging results for the conservation field that 50-66 percent of landowners have a goal to keep their land intact and “in forest” (Markowski-Lindsay et al., 2018). Among 2,500 family ownerships, 625 in each of four northeastern U.S. states (Massachusetts, Maine, New York and Vermont), a survey found that 66 percent of respondents used a will for estate planning, 25 percent have combined a will with another tool that may control use of the land, and 34 percent have not used any formal planning tools (Markowski-Lindsay et al., 2017).

FREQUENCY OF BARRIERS ABOUT PLANNING THE FUTURE OF THE LAND BY ESTATE PLANNING CATEGORY

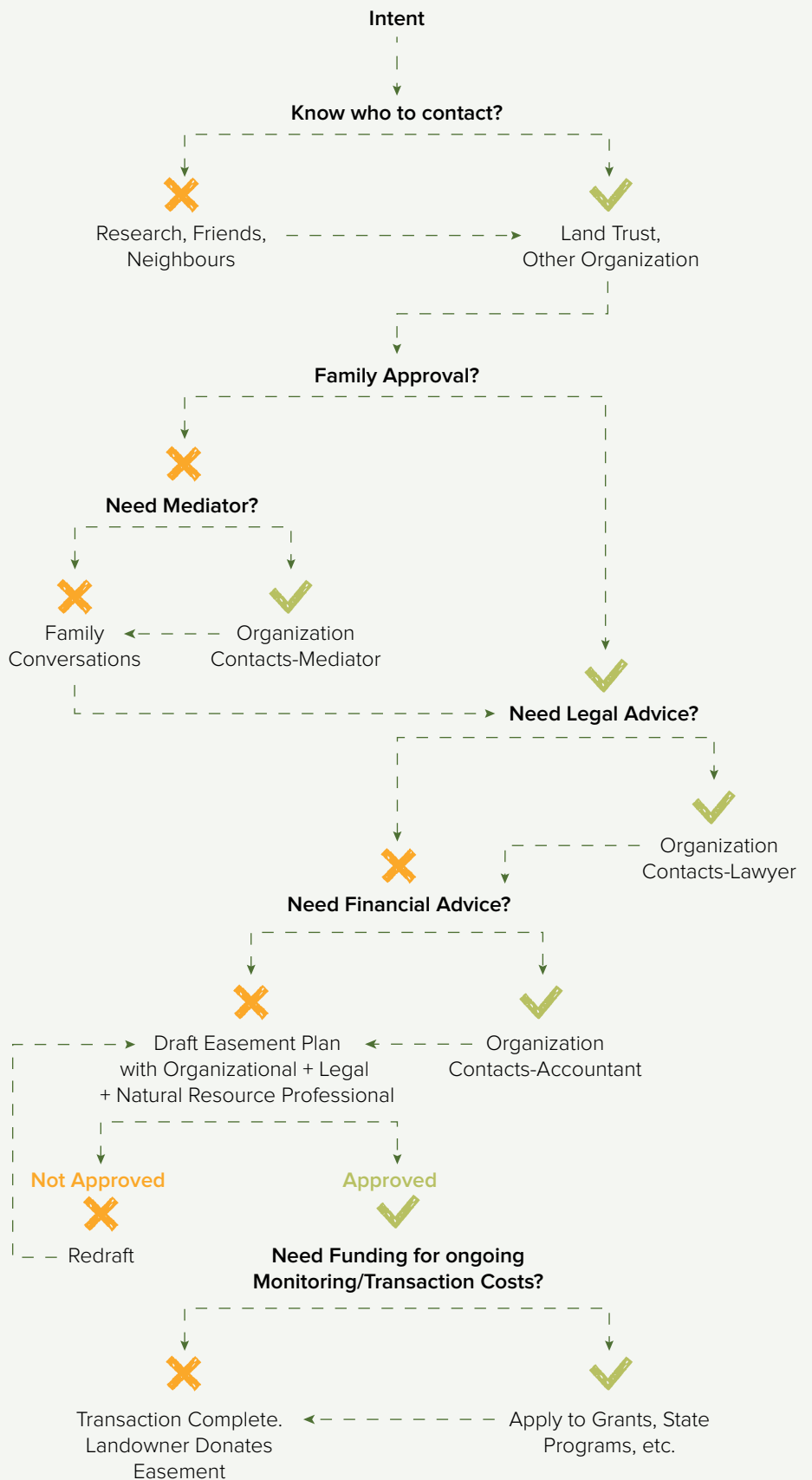
	 Will + Other Tool(s)	 Will Only	 No Plans
Does not know where to go for information about planning the future of their land	11%	16%	33%
Does not have enough financial resources to move forward with planning the future of their land	9%	14%	31%
Family does not agree on how to move forward regarding planning the future of their land	11%	9%	21%

(Markowski-Lindsay et al., 2017, Table 3, p. 41)



OVER-ARCHING BARRIERS TO GETTING AN EASEMENT

Time * Scale * Communication * Funding * Disillusionment



The authors argue that: "...the differences in planning by barrier ... suggest that materials directed at clarifying and/or reducing the costs of the planning process could provide a realistic view of the financial requirements for moving forward. For example, establishing policies through the Forest Stewardship Program or the Natural Resources Conservation Service to cost share the expense of estate planning or to change the income tax structure to make estate planning expenses for land deductible, might yield more landowners acting in a formal way to designate the future of their land." (Markowski-Lindsay et al., 2017, p. 43)

In a report on Connecticut landowners, meanwhile, Tyrrell (March 2015, p. 7), found that while, "[k]eeping their land intact for future generations is a major concern; nevertheless, almost a third would sell their land if offered a reasonable price (representing nearly 300,000 acres)—and 17 percent say they are likely to sell or give away their land in the next years (200,000 acres). The challenge is to keep this land from being further fragmented as the inevitable turnover happens."

Concept courtesy of Action Research



Desire to Protect Land From

Development: Several participants remarked that they wanted to protect their land from those who would want to develop or pollute it.

| “My goal is to keep the property open
| land, or at least get an easement
| for the property so that it won’t be
| developed. And I haven’t done very
| much except worry about that.”

| “Our legacy is to keep [the land]...
| It’s our little gift to mankind.”

Balance Providing for Family With

Protecting Land: Many participants spoke of struggles in how to use their land to provide for their family while still protecting their special, unique land.

| “Although I’ve thought about it, I
| haven’t done anything about it...will
| I [be able to] satisfy the things that I
| want to support and still be able to
| be fair to the kids.”

Misalignment of Kids’ and Parents’

Values: Despite the fact that the woodland owners’ kids are such a huge part of why they love their land, kids and parents are not aligned on what the value of the land is. Parents tended to see their land as special, unique, and an asset, but kids tended to more see the burden of land ownership (extra work, taxes, time, etc.).

| “I think a lot of those intrinsic values...
| [my kids] somewhat internalize,
| so they see the farm as being
| something special. Yet they don’t
| necessarily want to grab a shovel
| and a hoe and spend the rest of their
| life growing potatoes.”

| “[My daughter] wants me to sell it for
| the highest price to a developer and
| give her the money.”

MassConn Woods Focus Group: “Legacy Planning” for Their Land – Stafford, CT

Following the MassConn Stafford estate-planning workshop on Oct. 14, 2015, AFF and Action Research organized and conducted a focus group to gather woodland owners’ perspectives about legacy planning. A total of 10 owners who owned nine parcels (including a husband and wife couple) were paid a small stipend to stay after the meeting and answer a series of questions about their land and planning for its future ownership. Questions focused on benefits of owning forest land, family dynamics, legacy planning and evaluation of resources and messages.

Highlights of the results include:

- Owners felt their land is special and they felt a responsibility to care for it (“from development, for the environment, for my country”).
- Many felt their family was “not aligned about the land,” with tension between financial value and intrinsic value and challenges in lack of involvement and having hard conversations.
- Messages might best “reflect the balance landowners struggle with between protecting their land and protecting their heirs,” as well as the balance of “loving nature and perhaps not being a ‘tree hugger’ type.”
- Participants expressed “uncertainty and anxiety” from lack of information “fear of investigation, being scammed or making a mistake,” as well as difficulty accepting that they are getting older.
- Owners “seemed to very highly value their independence...However, this group seemed to build a lot of trust and shared personal stories quite quickly, suggesting that this small group discussion format may be very effective for landowners, particularly after a presentation about their legacy planning options.”

Kids Are Not Involved With Land: Almost all participants reported that their children were not highly involved in the day-to-day management of the land, which generally meant that the children are out creating their own lives outside of the land.

“They have busy lives. They don’t care.”

“We’d like them to take a part in the joy that I get out [of my land], but they’re so busy...They don’t really have the time or the interest that it takes to really keep the property up.”

Fear of Being Scammed: Another source of anxiety for many participants was how to know who to trust and whether they would actually be protected.

“It seems much more daunting to me to say, ‘Okay, you need to find somebody who knows tax law.’ Where am I going to find a guy who knows tax law related to forest and land? Where am I going to find an estate planner who... actually understand how this works... the risk...is getting hooked up with some shyster, and the next thing you know, your pockets are empty and he’s moving out...we have no clue about this high finance stuff...you’re really putting yourself in the hands of whoever you decide to listen to.”

“That’s the scary part, you don’t know if [the lawyers are] protecting [your land].”

Fear of Making a Mistake: Participants spoke frequently about the amount of information they need to make legacy planning decisions and while many felt motivated to make these decisions, they were afraid of doing something wrong, and were dragging their feet. One related concern was that their situation was unique, so they were not sure how the various options for legacy planning worked for their particular context.

“I’ve had a lot of conversations with each of my boys [about the land], but haven’t done anything concrete to date, for fear of making a mistake.”

Hard to Accept Getting Older: Another barrier landowners reported was they don’t have enough time or energy to do everything they want to do—they have this big piece of land, which takes a lot of work to maintain, and most do not have a younger family member assisting them. As they get older, it’s harder to just maintain the land, much less do research on legacy planning.

“We had 50 sheep, for 37 years, and then we cut back to 30 sheep as we got older. And they kept the pastures down, now when my wife died I sold them all...now I’ve got to take on that responsibility. And that has occupied most of my time for the last couple of years.”

See Others Doing It: Another important theme was that landowners reported being influenced by other landowners’ experiences. Several times during the group, when one participant mentioned they had met with a group or tried an activity, people became very interested in hearing about their experience.

“You know this group here, as we sit here, we don’t know each other, but we’ve really discovered some things...about what’s important... You’ve posed the question as to what your organization could do. It might be good if we could break into groups like this, because out of our discussions many interesting things have come up that I’ve noticed, that I wouldn’t have thought of on my own. And when you get a group this small people are willing to talk freely... And I gain a lot of insight from listening to people this afternoon as we’ve been talking.”

Engage a Wider Audience: One participant pointed out that landowners may believe that certain programs and principals only apply to someone who owns vast tracks of land, so they suggested the mailer could be improved by directly referencing that materials or programs are also intended for small landowners.

“It would be...improved if there was some way to slide in the idea that this is for small land owners. You might say, ‘gee I just have 40 acres – this is for forestry.’ And ignore it...”



SOME RECOMMENDATIONS OF THE FOCUS GROUP REPORT

Create a guide to difficult conversations with family (e.g., how to start, what to expect, how to talk about why the land is an asset)

Worksheets that each family member can fill out to help everyone understand each other’s values and goals

Locally available trustworthy resources (e.g., lawyers, foresters, organizations).

The Power of Peer Engagement: MassConn's Woodland Ambassadors

Many RCPs and regional collaborations are finding that owners themselves make the best salespeople for conservation and good stewardship. People tend to like people who are like them and respect people who have truly lived what they are talking about—those who have “walked the walk,” in other words.

“These peer family woodland owners are often in an excellent position to make trusted recommendations to an uncertain owner poised on the brink of a decision. Indeed, local peer opinion leaders can be more effective than foresters, because they do not carry with them the perceived desire to actively promote an agency or industry position,” (Kittredge, 2004, p. 17).

As NEFF and AFF got involved, the MassConn partnership had just

completed work on a grant seeking to create Woodland Ambassadors (awarded to Highstead and numerous partners in four RCP landscapes including an even larger landscape that encompasses MassConn—the Southern New England Heritage Forest). MassConn was already following the UMass model of routinely sponsoring owner events, such as “Woods Forums,” convened by a professional, but open for a wide-ranging conversation and whatever questions that the owners in attendance want to raise or discuss with the group.

MassConn was also partnering in a Forest Service grant focused on peer learning in the Massachusetts portion of the landscape simultaneous to the NEFF and AFF-coordinated mailings, and organized dozens of Woods

Walks that allowed landowners to get together, usually hosted at an owner's property, for a walk, food and learning about a specific woodland theme. Some of these owners had already conserved their land or were actively managing it, including harvesting timber for income and objectives like wildlife habitat creation. Woods Walks held through the climate adaptation outreach grants were focused on potential “demonstration sites” for examples of climate-informed forest management activities the grant was seeking to promote. These local events and Woodland Ambassador peer leader trainings have buttressed the large-scale outreach efforts within MassConn throughout the life of the project. Yet, experience has shown that staff and partner support is still often needed for successful owner-hosted events.



KEY TAKEAWAY

Offering sign-up sheets at events (for visits, email “Tips” opt-in, or other offers) is another fruitful tactic: the bonus is that landowners who are already motivated enough to show up and learn more, may be more likely to take the next step and put their name down on paper to be contacted again for a visit to their land. AFF's twice-a-month email “Tips for Landowners” is an effective tool for staying in touch with owners over time after their initial response to an offer, and particularly for advertising walks, workshops and other events geared directly to the landowner audience.



The Highstead report on planning and targeting outreach messages and outcomes concluded that: “Regional Conservation Partnerships (RCPs) of foresters and conservationists...can collaborate with Woodland Ambassadors to creatively bring together small groups of landowners in priority conservation areas to learn from each other” and “... help landowners take important steps toward stewarding and conserving their forestland,” (Labich, Nov. 2014, p. 2).

Other significant findings and advice from the Highstead report included:

- “Choose to highlight the fact that you’ll serve pie and coffee over explaining who’s in your partnership” (Labich, Nov. 2014, p. 7).
- Landowners have their own lexicon and it behooves experts to speak that language, and use the words that owners tend to use, when they are visiting with owners on their property.
- In addition to using a combination of channels, such as direct mail within a month of an event followed by one-on-one meetings with professionals, the most important strategy was follow-up to capitalize on landowner interest, especially if funding opportunities were in place.
- The best landowner engagement strategies were ones in which peer landowner leaders were cultivated and trained to assist in all aspects of outreach, but “not serving as event leaders, organizers, producers, or managing follow-through with attendees” (Labich, Nov. 2014, p. 7). These tasks were best left to conservation staff, the report advised.

Attempts to have self-sufficient owner volunteers organize walks and events at their properties did not work on autopilot. Significant time from a paid, part-time consultant was needed to organize the volunteers and provide them with support to promote and pull off events. As the Executive Summary notes: “...we learned of the critical importance of the landowner shepherd, the organization, or individual, that would encourage the landowner towards stewardship and conservation. Without that role, no activity would succeed in achieving its full potential” (Labich, Nov. 2014, p. 10).

Similar insights are offered by The Nature Conservancy’s “Landscape-Scale Conservation: A Practitioner’s Guide,” which suggests that a local project champion or landscape “CEO,” is a pre-cursor, and “single most important ingredient of conservation success.” Other key factors for success include: strategic approach and measures; engagement with key partners and constituencies; and importantly, adequate funding for project staff and “continuity of effort” (Low, July 2003, p. 4).

“The job of conserving functional landscapes must be done place-by-place-by-place, and year-after-year-after-year. Critical threats will continue to emerge. This work is ‘a 100-year job.’” (Low, July 2003, p. 4).



KEY TAKEAWAY

Don’t discount “absentee” landowners. Though often outreach efforts prioritize the “retreat” owners who live on their land as low-hanging fruit for likely response, the MassConn initiative found anecdotal instances of owners who live far from their land responding to offers of information. One owner who grew up in the landscape and now lives in Alaska expressed great appreciation for materials on estate planning. Another from Kansas responded to ask to receive a climate resilience info packet after getting a visit offer card. An owner from Texas, who responded for MassConn information, signed up for AFF’s Tips emails and used their online mapping tool to make a map of his land in Connecticut. Through email communication with the coordinator, the owner received a forester/estate planning visit from the project during a planned vacation the following year, and was considering a conservation easement, after first learning about the tool from the forester.





Profile of an Ambassador: Buying Land to Save It

The epitome of a MassConn Woodland Ambassador, Ted Wetherill owns 103 acres that literally cross the border of Massachusetts and Connecticut. Despite being what those in the conservation field term an “absentee landowner,”—someone who does not live on their forest land—Ted has been very active in reaching out and talking to his abutting neighbors about funding programs that are available if they want to pursue conservation as he has done.

Ted describes his motivation as somewhat in his own interest as he would like to see how much he and local land trust partners can conserve in his neighborhood. He likes the privacy and “just leaving everything pretty wild.” He loves the solitude, the trees and intriguing flora like moss. (Ted recommends a book called “Gathering Moss,” and says that after reading it, “You’ll never look at moss the same way again.”)

Once he decided he wanted to buy land, Ted searched for a couple years for a wooded property within an hour or so from his residence on a more traditional house lot in Rhode Island. He was surprised to find such a diverse parcel so close to the small city of Southbridge, and purchased the first 71-acre property in 2015, adding an adjacent 32-acre parcel over the Connecticut line in 2017. He was thinking about conservation all along. His application is now pending for a permanent federal conservation easement through the Healthy Forest Reserve Program of the Southern New England Heritage Forest RCPP.

Ted says he has enjoyed being in the woods ever since he was about 10, doing “kid stuff” during outdoor adventures on family visits in Virginia. He observed so much fauna when he was growing up: salamanders, frogs, box turtles, snakes and skunks. “Now, you don’t see so much anymore,” he notes. “You hardly ever see a box turtle anymore.”

Ted says his knowledge of conservation and stewardship resources “just sort of snowballed,” as he met foresters and land trust representatives. Eventually he completed the UMass Extension Keystone program, which trains landowners and volunteers interested in conservation to be advocates in their communities. Ted also received a Considerations for your Woodlot Checklist assessment for climate resilience and future woodland health through the MassConn Woods outreach initiative, and received a bird habitat assessment through the RCPP grant, choosing to manage for Blackburnian Warbler, which prefers closed canopies with hemlock.

Ted later attended several Harvest/Woods Walks about sustainable timber management to learn as much as he could before conducting a harvest on his own land. He embarked on forest management because he really needed a woods road to better access the land. “The harvest was pretty traumatic,” says Ted, speaking less than a year after 50,000 board feet and 90 cords of firewood were removed. He did a little better than break even after the cost of paying the

Ted Wetherill, MassConn Woodland Ambassador in Southbridge, MA, shows walk guests a picture he had taken of a wasp in a tree on the trail, photo by Lisa Hayden

forester for marking the trees ready to be harvested and loggers for removing the timber, which was sold to Hull Forest Products in nearby Pomfret, CT.

As Ted has shared his conservation journey with his neighbors, he says it is a very slow process to get people to trust. But, so far, four of his neighbors have applied for the same RCPP program he is pursuing that includes federal payments for development rights, for about 250 contiguous acres in one of MassConn's high-priority forest blocks and wildlife corridors.

Blackburnian warbler



A Labor of Love: Taking on the Care of Her Land

On a recent August morning, Gay Marie Parizek Lehrer watched five great blue herons and three egrets fly over the open fields to the swamp in her woods. "They're getting ready to start their migration toward the ocean to feed," she says.

Among her goals for the 200-acre Stafford, CT, woodland and sweeping meadows she inherited from her partner in 2014 is to continue making the place "wildlife and bird and bee friendly."

"God created this (place) and he put us here to take care of it," says Gay Marie, adding that grounding with the land is very important to human health. She

says her favorite thing about the woods is "The smell," with its earthy essence.

Her land ranked well in a competitive application for a Healthy Forest Reserve Program conservation easement being offered through The Last Green Valley grant with MassConn Sustainable Forest Partnership and a Rhode Island agency in a federally funded Regional Conservation Partnership Program (RCPP). She is beginning to work her way through that lengthy and multi-step review process.

A native of Willington, Gay Marie grew up on a 30-acre woodland where she has treasured memories of time spent

with her parents and grandparents. "My grandmother and grandfather were an old Czech couple," she says. "He was a butcher and had a butcher shop. My grandmother had a 2-acre garden every year. She always wore traditional Czech clothing. She never modernized."

Providing recreation for family and friends is another goal. After hosting a recent wedding in a tent on the field, on this day, she was helping to prepare for a reunion of the Davis family, who get together annually at the property (which was originally part of a land grant from the British crown to one of the Stafford town founders, Cornelius Davis, for his service in King

Philip's War including an attack on the Narragansett Indians).

Gay Marie suggests that all the conservation and forestry organizations should make a list of what their acronyms stand for "almost like a family tree" to illustrate the connections between agencies and funding programs. "There are a lot of different groups. It's very confusing who's connected," she says. "You hear all these different names... you don't know what that is."

Though she had received a post card in the mail in spring 2015 inviting her to meet with a land protection specialist, Gay Marie ended up returning the card to request the visit only after talking with her neighbor, who was involved

with the local Northern Connecticut Land Trust — and, as it turned out, was collaborating with the MassConn Woods to provide some of the landowner visits.

Gay Marie says her family has kept her very busy since she took on the land, which borders state forest and other conserved land near the Massachusetts line. The program "kind of babied me," she says, providing a heads-up when events of interest were coming up and when programs that might benefit her became available. From the MassConn Woods, she received funding to treat invasive weeds along the woodland path.

Enrolling in PA 490 has been a huge help in providing property tax relief,

she says. With a climate-informed forest management plan written by forester Eric Hansen through a Wildlife Conservation Society grant to the MassConn Woods, Gay Marie plans to continue managing the land, with a timber harvest due in about five years. In earlier eras, wood from the land provided sheathing for the historic barn and granite for the footings came from the quarry.

Gay Marie says the land provides her with a great deal of solace: "That's when I feel my best, physically the strongest, when there's just a connection with the land." She would like to someday combine her talent for photography with nature walks, providing an opportunity for families to spend time in the woods and to take home a picture to remind them of the day.

Not to say that ownership doesn't have its challenges. "Nature is always growing. It grows faster than you can keep up with it," she says. She used to have 15 brahma chickens but gave the babies to a farm where they can roam free-range because she has been too busy lately. She is looking forward to a new flail mower that she expects will help her and her helpers to maintain the stone walls, which can get overgrown with bittersweet vines.

"The main thing is getting the woodland into conservation," says Gay Marie, while the agricultural lands will likely remain as an option should her children or grandkids want to build a house someday. "I hope to get more focused on everything (about the land)... I want to keep this as a sort of sanctuary."

LEFT: Gay Marie Lehrer at her barn door, Stafford, CT, photo by Lisa Hayden
RIGHT: Bet Smith talks with her forester, Eric Hansen, at The Fen, photo by Lisa Hayden





Walking the Walk: Landowners Leading on Their Land

Walking in their Woodstock, CT, woods on a balmy January afternoon, Bet Zimmerman Smith and her husband Patrick were talking with a forester about the wildlife that visits their land—everything from bobcats to bluebirds—and how to create habitats for them. Looking up to the maple branches arcing above their heads, consulting forester Eric Hansen pointed out the tree was already putting forth red buds—and yet winter was far from over.

“It was a fantastic experience. We learned so much,” says Bet of a free, 2-hour forester visit they received in 2016 through the MassConn Woods partnership. “Eric offered useful tips on how to prepare for the changing climate, and how to best attract wildlife.”

Early bud break is just one example of the many changes landowners and managers are noticing in the New England woods. Temperature and rainfall patterns have changed. For example, annual precipitation has

increased 3-6 inches in Southern New England, causing more frequent flooding and erosion as streams overflow their banks and overwhelm culverts. Average annual temperatures are projected to increase 5 to 10 degrees Fahrenheit by the end of the century, and with a longer growing season, more extremely hot days (Manomet, 2010), and variable summer rain, droughts may also become more frequent (Horton et al., 2014). With changing conditions, it’s best to have a variety of native tree species present, so eventual “winners” can adapt and thrive.

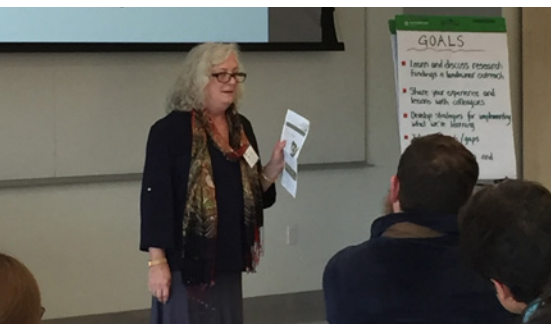
Following their visit, the Smiths were left with a “Considerations for Your Woodlot” Checklist of suggested practices for their unique site—a 30-acre property they affectionately dubbed “The Fen.” They are applying for federal “cost-share” to control invasive plants, many of which do well with warmer temperatures. When trees are already stressed by bugs or disease, changing

climate conditions such as drought or storm damage can gang up on them, making it harder for them to recover.

“One of our biggest challenges is managing invasive plants, since the property had been untouched for four decades,” says Bet. In addition to winged euonymus (burning bush), Multiflora rose, and “the dreaded tick-infested Japanese barberry...Eric also spotted some other invasives we hadn’t: Japanese stiltgrass and glossy buckthorn,” she says.

Since then, Bet and Patrick have enthusiastically embraced the role of Woodland Ambassadors—agreeing to host a series of walks at their two Woodstock, CT, properties, both of which received the complementary forester visit and climate-informed Considerations for Your Woodlot checklists. She went on to hire the forester to write one of her management plans and assist with applications for cost-share funding from the NRCS.

An Outreach Symposium: Practitioners Brainstorm to Bridge Research and Reality



critical to building strong peer networks and fostering the welcoming, supportive environment and intimate social gatherings where sharing and learning among landowners can best occur.

Turbo presentations were followed by a facilitated discussion intended to help identify important areas of focus for outreach professionals to:

- Distill our combined knowledge and share expertise.
- Discern emerging best practices that should be shared more broadly to scale up conservation results.
- Highlight gaps in knowledge and areas of agreement for future research, testing in the field or funding.

At the Symposium, academic researchers and practitioners immersed in active outreach efforts shared brief talks about their recent work including: Brett Butler, Research Forester from the US Forest Service and the Family Forest Research Center; Paul Catanzaro, Extension Assistant Professor at UMass Amherst; Katherine Hollins of the Sustaining Family Forests Initiative and TELE (Tools for Engaging Landowners Effectively) at Yale School of Forestry & Environmental Studies; Elizabeth Vranas, Northeast Conservation Manager from American Forest Foundation, and Lisa Hayden, Outreach Coordinator of New England Forestry Foundation, both of whom partner with the MassConn Sustainable Forest Partnership (“MassConn Woods” RCP).

Scaling Up Effective Landowner Engagement Practices

Outreach Professionals Identify Gaps & Emerging Directions for the Field in New England

Aware that our goals for conserving 30 million acres of New England will require effective outreach to the people who own that land, New England Forestry Foundation (NEFF) wants to support our partners to adopt the most effective and efficient practices.

With grant support from the Overhills Foundation, NEFF hosted a landowner outreach symposium on Nov. 16, 2018, at the UMass Design Building before the Regional Conservation Partnership Network meetings, titled “From Research to RCP Reality: Scaling Up Effective Landowner Engagement Practices to Propel Our Vision for New England.” This half-day workshop brought together academic experts with outreach practitioners to share current work and discuss scaling up best practices and promising avenues of research.

A headline question participants sought to answer: How can we synthesize research results and promote knowledge transfer about how landowner outreach activity can most effectively and efficiently achieve results for conservation?

Organizers were honored to have many experts in the room who spoke from years of experience working with landowners. Mary Tyrrell, recently retired Director of Sustaining Family Forests Initiative/Tools for Engaging Landowners Effectively (TELE) at Yale School of Forestry & Environmental Studies, was invited to open the symposium by sharing her perspective on landowner outreach over her past decade of work developing the TELE program. An important observation from Mary is the difficulty of winning funding for the “non-sexy work” of landowner outreach, such as coordinating events, planning communications and tracking responses for follow-up. The routine tasks of ordering food, making and distributing event fliers, and taking the time to individually call or email owners may not be rocket science, but they are

Outreach Symposium Findings

About two dozen participants (who were joined by some RCP leaders for portions of the discussion) broke into four discussion groups, and had a chance to participate in two brainstorming sessions each.

The chart below presents key themes that emerged from facilitated groups of outreach specialists and experts at the November 2018 Landowner Outreach Symposium, “From Research to RCP Reality.”

WHAT LESSONS CAN BE EASILY REPLICATED AS BEST PRACTICES?

- Need for continuity (in outreach to landowners over time)
- Doing “peer-to-peer” right (support provided to peer leaders, as well as to conservation and forestry professionals/practitioners in how to implement these programs)
- Sharing when we know what works (such as AFF’s Community of Practice: practices tested in a variety of landscapes, results shared)
- Landowner cohorts by generation or motivation segment (retreat, working the land, absentee, etc.)

HOW CAN WE EVALUATE OUR OUTREACH WORK?

- Inventory software
- Developing appropriate metrics/tracking on-the-ground results
- Ensuring appropriate data is collected so outreach can be fully assessed
- Pairing research and extension (state/university agricultural programs)
- Encourage an environment of active learning and sharing
- Develop a toolbox for assessing outreach activities

WHAT DON'T WE KNOW?

- Timing for outreach/when to influence (post-purchase of land, or nearing retirement, etc.)
- Family dynamics—legacy planning
- Database(s): What are they? How to use them?
- Social media/conservation and younger audience (who will they be?)
- Broader community engagement vs. landowners
- Response to climate change messaging

GAPS IN KNOWLEDGE TO TEST IN THE FIELD?

- Applying research to best practices: how much is shared/used — Create a Hub?
- Coordinating work/knowledge (keeping up - what is everyone doing?)
- Resources for evaluation, standards
- How can we frame research to produce actionable findings (results that can be implemented in the field to improve outreach)?

ARE THERE THINGS WE SHOULD DO LESS OF?

- Untargeted mailings (someone should be ready to take the next step)
- Too many labels/branding fatigue
- Too much jargon
- Return on Investment (ROI) — gauging efficiency

HOW CAN WE APPLY LEGACY PLANNING RESEARCH TO PRACTICE — AND SCALE UP RESULTS IN ACRES CONSERVED?

- Now that we have learned 50-66 percent of landowners have a Goal to keep their land intact and “in forest”—focusing on tools to meet their goals!

- Peer to Peer landowner engagement—which is capacity intensive, requiring follow-up to engaged owners
- Providing tools and facilitators (such as UMass estate planning forums/publications to assist owners to plan)
- Develop modules/example programs such as the Your Land, Your Legacy materials, for use in RCPs

HOW CAN FUNDERS SUPPORT YOUR RCP TO DO LANDOWNER OUTREACH?

- Building capacity to implement outreach (i.e. paying staff)
- Measuring impact of outreach by implementing tracking, monitoring and evaluation tools
- Improving outreach effectiveness —identifying what to include in a toolbox; build a better hub of resources
- Moving from discrete one-off outreach events to a more strategic campaign that supports landowners through a series of smaller steps over time, building to a larger goal action
- Transaction cost funds (for completing conservation deals with landowners, purchasing development rights, etc.)
- Tapping into under-utilized NRCS funds when available
- Some consistency in outreach funding so RCPs are not competing for the same resources

A COMMON BASIS OF TRAINING ACROSS THE RCP NETWORK, SUCH AS:

- TELE approach
- Training on initiating and fostering Landowner Peer to Peer Networks
- How to conduct surveys like the Conservation Awareness Index/or focus groups

Investing in Landowner Outreach

The process of land conservation is a marathon, not a sprint. And yet the New England conservation movement must now set a record pace.

Just as it's crucial to keep reaching out to the same landowners over the years with information, invitations to learning or social events and connection to experts (particularly as their knowledge and engagement grows), there is a corollary: it is vital to sustain funding for strategic landowner outreach programs over time to keep propelling those newly engaged owners to the next step of their decision-making process.

Unlike shopping for a consumer product, decision-making about land is not a one-time purchase, but a multi-year—even life-long—process. It's likely to take a series of interactions with the unengaged landowner before they make the decision to actively pursue conservation or forest management. Even when an owner comes to the point of knowing they want to protect their land from development, that is just a starting point for the actual conservation deal or transaction which frequently takes multiple steps and years to complete.

The desired outcomes of outreach—another protected property, or a woodland on course for ecologically based, exemplary forestry—are not ideally suited for a one-off, single-grant time frame. Yet conservation

organizations are often trapped in the cycle of chasing the next grant. They must build a program, often including outreach components to meet specific objectives over 2 or 3 to 5 years. They make some progress, submit a report on outcomes at the close of the funding period and then start from scratch on a new project. The records of interactions with landowners who participated in the past program might be dispersed, filed away, or in some cases kept by individual organizations for follow-up (though often only within the memory of individual staff who were involved). Efforts to continue engaging those owners can often languish at that point, unless the project developed a record-keeping system or database of outreach and landowner response—and unless there was ownership among designated partners for follow-up and access to the information.

As the New York-New England Family Forest Owner Engagement Initiative concluded in 2014, “It is common knowledge that it usually takes much time, effort, and money for landowners to move from awareness of their options to action. However, most RCP members ... believe all three are in short supply” (Labich, Nov. 2014, p. 10).



KEY TAKEAWAY

Funders tend to want immediate or relatively short-term (1-2 years) results, and seem less interested in supporting the relatively small investment of salaries for the outreach practitioner (in fact, some federal grant programs explicitly avoid funding for outreach and want to pay only for on-the-ground outcomes).

However, modest investments in proactive outreach can produce significant results. When staff are able to build an outreach program over an extended period, they are able to develop expertise, not only in the local landscape and owner concerns, but in partner resources and funding programs. They may become known as a trusted point of contact and receive referrals through word of mouth, while getting to know owners in their region through repeated interactions and offering continuity. Even the salary for an intern (through the TerraCorps/MassLift programs, for example), can jump-start landowner-focused outreach activities, such as hosting walks and educational forums and the time-consuming “PR” steps of developing communication materials to promote and host those events, not to mention the key step of following up with attendees after the event or visit with a professional.

Thus, a key recommendation of this report is a call to action to make landowner engagement a priority: to make an investment to turn “Best Practices” for outreach into “Business as Usual” operations for forestry and conservation partnerships working at the landscape scale.

In a follow-up survey to attendees of the November 2018 Landowner Outreach Symposium (completed by about 30 percent of participants), 100 percent said they would value additional workshops and training on landowner outreach. Asked the most important issues for the New England outreach community to follow up on, respondents ranked highest the need to:

1. “Advocate for routine funding to sustain landowner engagement in priority landscapes.”
2. “Pairing research and Extension/ on-the-ground outreach to hone and test best practices.”
3. “Test audience segments, channels and messages to learn what works.”
4. “Curating of tracking, monitoring & evaluation tools to measure impact.”

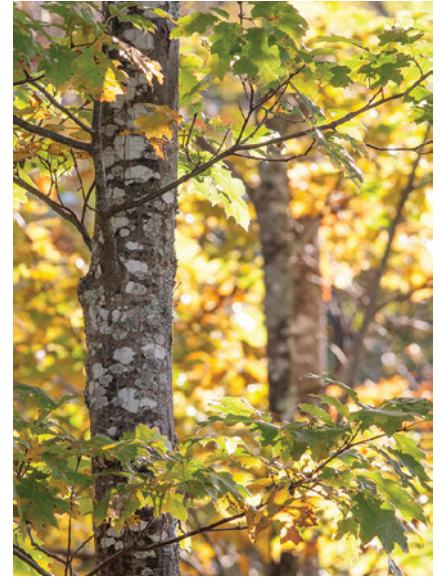
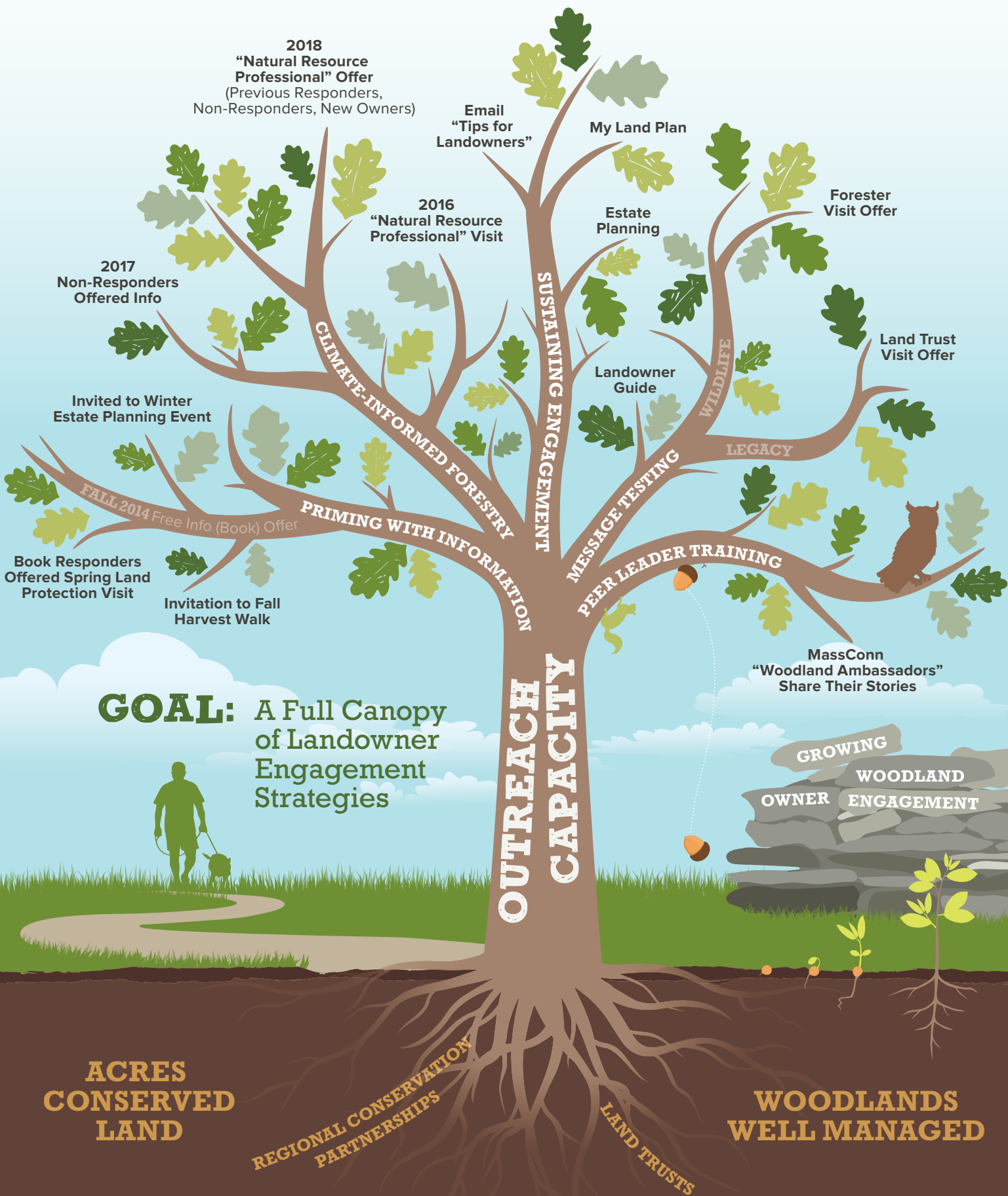


Photo by Charlie Reinertsen



Caltha palustris, marsh marigold or cowslip, photo by Leslie Duthie



Recommendations: A Call for Investment in Strategic Landowner Outreach

NEFF proposes that the conservation and donor communities collaborate to find or generate and apply sustained funding for long-term, protracted outreach activity for each Regional Conservation Partnership to propel efforts toward the Wildlands & Woodlands Vision (W&W). To reach the goal by 2060 (now only 40 years away), will require a tripling of the current pace of protection (Foster et al., 2017).

Our successful pilot work in the MassConn region now allows us to estimate what level of support is required to design comprehensive communication campaigns to deliver tangible conservation benefits. Our recommendation is to fund and implement similar but tailored efforts in each of the 44 RCPs, as appropriate. This is the path forward to achieving the land protection and management goals of Wildlands and Woodlands.

Outreach approaches need ongoing funding to marry a focus at the parcel/ecological attribute level with considerations of social psychology, behavior change, and the human dynamics of landowner peer learning networks. We then need to systematically reach out to and engage the owners of high-priority parcels for conservation to ensure they are aware of their options to conserve and steward land. A comprehensive, sustained regional communication effort designed to achieve long-term conservation goals will require a significant investment, but it is the only way to reach the owners of these lands and achieve the overall vision.

Applying marketing techniques to landowner outreach is a growing area of professional expertise. Many important tools already exist—and are waiting on the workbench. We now need to load them into our collective tool belt for more frequent and proficient use. Based on the preceding insights about the gaps/ongoing needs for landowner outreach, NEFF is advancing the following recommendations for New England’s Regional Conservation Partnerships (RCPs).



Develop a Tactical Tool Belt for RCP Landowner Outreach

The outreach modules in this tool belt will provide the means to turn “Best Practices” for outreach into “Business as Usual” operations in New England’s RCPs. Based on local needs, the tool belt can be outfitted with the full arsenal of implements—or tailored to fill each RCP’s gaps in outreach capacity. The modules will include customizable templates for segments of the landowner audience, for specific themes and uses (direct mail post cards, invitations, fliers, etc.) and for particular outreach objectives (conservation easements, property tax programs, forester consultations, etc.).

EMBARK ON CLIMATE CHANGE OUTREACH TO LANDOWNERS

RCPs and their funders need to disperse and deploy a suite of recently piloted outreach tools for climate-informed forestry/land management and further integrate climate change solution themes (i.e. mitigation through enhanced carbon storage in forests and wood products) into landowner outreach materials. NEFF, AFF and NIACS demonstrated effective use of climate change outreach tools in the MassConn Woods, including direct mail messaging about forest health and climate resilience and checklists for one-on-one forester visits with owners for parcel-level adaptation advice. In an informal survey of 2019 Massachusetts Land Conservation Conference attendees, tools for communicating with landowners about climate change, adaptation and carbon management were the highest priority interest area for respondents.

FILL GEOGRAPHIC DATA GAPS FOR CHARTING OUTREACH STRATEGY AND DEVELOP A W&W GREENPRINT

Fund and periodically update GIS and parcel-level mapping tools to fill in gaps where data do not already exist to assist RCPs to complete New England-wide targeting of high-priority lands for wildland conservation, exemplary forestry, agriculture, wildlife habitat and other components of W&W outcomes. Training for use of The Nature Conservancy’s Climate Resilience maps would allow prioritization of highly resilient properties in outreach campaigns.

SUPPORT RCPS TO DEVELOP ONE-STOP LANDOWNER RESOURCE CENTERS IN CONSULTATION WITH EACH STATE EXTENSION OFFICE

Owners tend to be confused by the myriad public and private funding avenues they could go down. At these service sites established at a key RCP partner organization, owners can access info at wherever they are on their ownership path. As Tyrrell (2015, p. 7) notes, “Both awareness and use of traditional landowner assistance programs are extremely low,” and in Connecticut, with few public service foresters, a need was identified for more assistance on the ground. These Landowner Resource Centers could be located at a land trust or other non-profit partner site to provide an alternate to government-sponsored resources which can be a barrier for some owners. In addition to brochures and informational materials, a key aspect would be a knowledgeable contact person to connect owners to the current available funding programs and offer a smooth on-ramp to NRCS cost share rolling deadlines and connection to Technical Service Providers who help owners to navigate the bureaucracy of federal applications. AFF’s Woods Camp (forestfoundation.org/aff-acquires-woodscamp), adopted in some states, is one example of a program that helps match and connect landowners to opportunities through online resources and social media.



DEVELOP INITIAL ENGAGEMENT RESOURCES

Develop initial engagement resources for previously unengaged, or brand new landowners (those who recently purchased woodlands) and who may be just beginning to think about their land beyond its monetary value, such as:

- A landowners’ introductory guide emphasizing the suite of multiple benefits of forests, combined with general interest nature writing and advice about common ownership challenges: similar to *The Place You Call Home* guide. NEFF produced Connecticut and Massachusetts editions of this popular 80-page magazine resource with *Northern Woodlands* magazine, but editions could be created for each New England state—and periodically updated.
- Campaigns and support for getting owners enrolled in state current use programs to save money on their property taxes and reap the benefits that society acknowledges for the ecosystem service values of open space land.
- Inviting new or unengaged owners into the local landowner peer network for learning and connections to meet their goals, such as engaging with neighbors, local land trusts, and referral to foresters or other professionals.

EXPERIMENT WITH APPLICATION OF MARKETING SEGMENTATION DATA

Continue to experiment with application of marketing segmentation data to the landowner audience and test integration of digital outreach tools such as social media platforms and other avenues of online engagement.

Social media may not be the channel to reach some older-generation members of the landowner audience who are not now participating on those platforms, however, outreach practitioners must keep pace with the online habits of younger-generation owners as well. We need to build online tools into our outreach toolkit so we are connecting with and continuing to build relationships with these owners now, in order to support their decision-making in the decades to come.



North American beaver, photo by Larry Master

FUND ROUTINE GRANTS AVAILABLE FOR RCPS

Fund routine grants available for RCPS to apply to bolster their outreach capacity based on locally developed goals (including the “non-sexy” nuts and bolts of marketing, communications and event coordination for the landowner audience), or the integration of any of the Tool Belt outreach modules.

These bridge grants would include funds for practitioner training on key outreach concepts (such as TELE, climate outreach, evaluation, or developing peer-to-peer networks, etc.). This additional funding source would keep routine outreach going between geographic or restoration-themed “big-ticket” grant campaigns and allow RCPS to maintain momentum with engaged landowners in multiple strategic locations.

- As focus on climate change intensifies and incentives are developed for environmental commodities such as carbon storage and protection of air and water quality, these routine funding sources could also be an avenue for building the outreach infrastructure to market and support landowner networks for ecosystem services payments, potentially among aggregated parcels of privately owned land.
- These grants could provide support for each RCP to identify the typical series of steps that owners in that area are likely to progress through on their journey toward conservation or more sustainable forest management (there may be interim outcomes and sub-steps, for example, progressing from current use enrollment to pursuing an easement). TELE calls this the “Landowner Ladder of Engagement,” while AFF calls it the “the Landowner Journey.” Identifying these rungs on the ladder, or typical stages of engagement, can help programs plan targeted marketing materials or events to help move owners from one step to the next, ultimately leading to on-the-ground outcomes of more acres conserved and sustainably managed. Because we may not have the resources to reach all high-priority landowners, focusing follow-up on those who are primed for action (based on their history of engagement) is a solid strategy.
 - Along with identifying the ladder of engagement comes sustaining follow-up to owners whose interest/engagement has lapsed. The process of tracking landowner responders from year to year and following up with owners who previously expressed interest, is one of the most important parts of outreach—because repeated engagement will be needed for most owners to adopt the desired actions of conservation or forest management. And yet, this step often falls through the capacity cracks.
 - There is great value in having outreach and communications professionals routinely engaged in assessing targeted marketing activities to various groups of landowners in order to develop the most effective follow-up tactics. For example, small-group owner meetings with cost share professionals or free consults with estate planning attorneys or family facilitators, can assist owners to the next stage of their landowner journey—and these efforts can produce on-the-ground results with owners who are prime prospects. Ongoing outreach activity also allows continued expansion of the pipeline of engaged owners beyond those already known to include new prospects.

As a report on Connecticut woodland owners notes (Tyrrell, March 2015, p. 7-8), traditional programs geared toward silviculture are “not necessarily appealing to our ‘woodland retreat’ landowners. In order to get these landowners onto the engagement ladder of more and more active management of their woodlands, perhaps the traditional programs should be supplemented with lighter touch advice and assistance focused on activities the landowners enjoy, and solving the landowners’ problems. Once a landowner is engaged with a professional in small ways, such as getting advice on how to best cut firewood or build a trail, they are more likely to take some of the bigger steps such as silvicultural management for bird habitat or stand regeneration.”
 - In concert with a potential Wildlands & Woodlands public education/communications campaign about the value of forests for people and society, outreach modules to landowners of smaller parcels (of less than 10 acres) and even backyard pollinator habitats could also be developed, highlighting climate solutions relevant for all scales along the spectrum from rural to suburban to urban. As Tyrrell (March 2015, p. 8) argues, owners of less than 10 acres should not be neglected, for “they need good advice and support to manage their woodlots and wooded backyards well.” (At the time, there was one Connecticut state urban forester for 122,000 of these small woodlot owners.)

Teaming Up to Propel Our Vision for the Forests of New England

The conservation and forestry fields now need to combine our accumulated knowledge to implement effective and efficient outreach tactics. Listed below are some prominent storehouses of outreach expertise that could combine forces for a Wildlands & Woodlands moon shot. We need all of these silos of outreach expertise working in concert, and available for deployment, in each important forested landscape.

AMERICAN FOREST FOUNDATION (AFF) BEST PRACTICES AND OUTREACH RESPONSE TRACKING

AFF has developed a Landowner Outreach Community of Practice for sharing best practices as well as a digital Woodland Owner database for tracking outreach marketing, owner response, action on the ground, and parcel ownership over time. They offer online resources such as Woods Camp (a web-based tool to match owners with conservation programs or stewardship opportunities: forestfoundation.org/aff-acquires-woodscamp) and MyLandPlan.org which helps landowners connect with a professional, plan and complete activities on their land. Currently 18,400 woodland owners have created accounts, owning roughly 3.4 million acres, of which they have used the site's tool to map 1.8 million acres.

TELE (TOOLS FOR ENGAGING LANDOWNERS EFFECTIVELY)

TELE based at Yale's Sustaining Family Forests Initiative has developed an outreach project planning protocol for identifying landowner-centric outcomes related to conservation goals, a message generation framework and monitoring follow-up. One of the pioneer programs in applying marketing techniques to landowner outreach over a decade ago, TELE's resources provide a strong foundation for outreach projects to think through their audience and outcomes early in their implementation and to continually gauge success and improve results. Outreach grants could systematically provide funding for TELE training for RCPs, land trusts and conservation practitioners who have not received it.

UMASS AMHERST

UMass Amherst and partner institutions have done significant research on conservation-based estate planning and created publications (such as "Your Land, Your Legacy") supporting owners to proactively engage in succession planning for their land—or to pursue conservation if that is their goal. With an aging landowner cohort in New England and the prospect of many high-priority lands changing hands in the next two decades, dedicated funding for proactive outreach, as well as a module of estate planning resources for landowners will be a key ingredient for success to meet Wildlands & Woodlands goals. Particularly when 65 percent of owners say their goal is to keep all or most of their land in one parcel, and 49 percent want to keep it undeveloped (Catanzaro, Markowski-Lindsay, Leahy, Sass & Ferrare, 2016), creating outreach campaigns based on key points in the owner decision cycle (such as retirement age or other key life events like funding college education), could help to scale up estate planning support and engage more owners in pro-active planning for their land assets.

- Pairing of existing conservation-based estate planning resources with targeted outreach campaigns to test messages to landowners at key life stages or age cohorts. Annually offer a module of estate planning resources that can rotate in central locations throughout New England to allow motivated landowners who most need planning support to avail themselves of curated resources such as long-term care options, family facilitation or tax advice from professionals who are conversant in property law and land conservation options. Develop an RCP Network landowner support group or help line that could provide quick response upon request for family communication issues that may arise as estate planning ensues.
- Support for RCPs to compile and routinely update region-specific contact lists of estate planning attorneys with conservation experience, resources for family facilitation, long-term care insurance specialists and tax advisors and accountants. These contacts are always in demand, but deep lists of qualified professionals are not always readily available when needed. According to the MassConn 2017 Conservation Awareness Index, 84 percent of respondents said they DID NOT know of "an estate planning professional who is familiar with land conservation," thus indicating the need to develop a network of these kinds of experts available to refer interested landowners. Development of regional professional development (through conferences and training programs, etc.) to continue building the ranks of conservation-minded professionals from the estate planning fields would be worthwhile.



WOW (WOMEN OWNING WOODLANDS)

The national WOW network, funded through the U.S. Forest Service with support from TELE and the Forest Stewards Guild to identify effective social networking outreach to this crucial segment of the landowner audience, deserves investment for expansion into new areas. In addition, several RCPs and other collaborative partnerships have pioneered robust peer-to-peer social networks focused on outreach to landowners within high-priority conservation landscapes (Cold Hollow to Canada, North Quabbin Regional Conservation Partnership, etc.). This experience could be applied more systematically in other areas, especially if targeted training was provided in “how to do peer-to-peer right,” as was observed at the Outreach Symposium.

womenowningwoodlands.net

catalog.extension.oregonstate.edu/em9064

Conclusion

No one can predict exactly how New England’s forests will fare over the coming half-century, but we can make educated guesses based on solid research. The New England Landscape Futures Project seeks to model how current trends and potential future scenarios for land and energy development may affect the region’s natural landscape. With the “Forests as Infrastructure” scenario, we could increase by 20 percent the percentage of tree species with high commercial and wildlife value, double the amount of local forest products harvested, protect water quality, increase the amount of carbon stored in our forest by 35 percent, and reduce forest fragmentation by 25 percent (Thompson et al., 2014, p. 3-4).

Interviews with natural resource professionals about these scenarios underscored the important dynamic of the private ownership of forests as both a barrier and an opportunity (McBride, Duveneck, Lambert, Theoharides, & Thompson, 2018, Abstract): “The stakeholders overwhelmingly viewed ecological and social issues as interconnected rather than as distinct systems. They perceive the central challenges to sustainability to be: lack of funding and government support, increased development pressures, changing landowner demographics, and the difficulty of accounting for aggregate impacts in a dispersed planning context. The reduced ability of landowners to derive market values from their land was an overarching concern, with parcelization, fragmentation, and poorly planned development viewed as having a disproportionate impact on the character of the land and the potential to exacerbate the negative impacts of other drivers such as climate change. Perceived opportunities for promoting sustainable futures include ... realigning monetary incentives to recognize the collective benefits that forested landowners provide.”

Effective, strategic and sustained outreach to the owners of these forests will be crucial to making the scenario of a fully-functional, forested future a reality.

Scaling Up Strategic Landowner Outreach in New England

Recommended Stakeholder Actions	Land Trusts / RCPs	Public Agencies	Academic Researchers	Funders
Sustain Outreach Efforts	Build pro-active outreach into concrete plans to achieve W&W Vision outcomes	Seek opportunities to systematically offer large-acreage owners useful resources	Investigate hypotheses about timing of inflection points for landowner decisions	Fund bridge grants to keep up outreach momentum between high-profile projects & maintain continuity to owners
Build a Tool Belt: Best Practices Become Business as Usual (avoid funding competition between RCPs)	Identify gaps in regional resources and strategically offer/ implement programs to fill outreach gaps; evaluate ROI	Provide synthesis products to allow easier use of ownership statistics, parcel mapping data and other public info for outreach by partners	Support broader adoption of useful tools, such as estate planning resources and family facilitation	Support outreach “non-sexy” basics in grant proposals, including staff/ organizational capacity (messaging, mailings, landowner events, tracking)
Network With Other Practitioners to Speed Learning / Implementation and Share Resources	Create hubs to distill knowledge, allow practitioner resource sharing, and coordinate regional training, such as TELE, peer-to-peer programs	Seek to simplify bureaucratic steps to enrolling landowners in funding programs	Partner with conservation organizations to apply research findings to the field; pair research & extension	Coordinate grants and cycles to avoid repetitious funding streams & improve efficiency of outcomes; support communities of practice
Innovate for Even Greater Future Success	Embrace pro-active outreach tactics to prioritize prospect owners, parcels, rather than waiting for landowners to come to us	Abandon protocol with diminishing results (such as management plans that owners never implement because they lack \$)	Routinely partner with outreach practitioners to pilot promising applications of social science research about landowner motivation	Support outreach experimental efforts such as digital marketing tactics to identify prime prospects; invest in social media for outreach to next generation owners
Use Social Science to Understand Landowner Motivations and Responses	Apply & enhance peer learning techniques to recruit a corps of “ambassador” landowners who can inspire others	Seek opportunities to reduce landowner barriers to action (both perceived and actual)	Frame academic studies to provide actionable results for practitioners: research that works—answers what we don’t know	Fund practitioner training to implement peer learning programs and other proven avenues for engaging cohorts of landowners
Monitor and Report on Metrics	Integrate all RCP conservation priority maps to create a W&W “greenprint”	Develop landowner outreach measures of success, rather than just acres	Provide guidance to practitioners to vet outreach approaches for academic vigor	Encourage evaluation measures that last beyond the funding cycle & propel next steps

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