Forest Legacy Best Practices
Prepared by Mount Grace Land Conservation Trust/North Quabbin Regional Landscape Partnership
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Challenges to using Forest Legacy:

- *Appraisals*: take a long time (intense, specific requirements that can change during the course of your contract, limited number of qualified appraisers), and Northeastern Area has a policy that projects totaling more than one million dollars require a federal review appraiser.
- *Still a long process*. Landowner circumstances easily change in the 3-5 year timeframe (death, divorce, financial hardship, etc.).
- *Due diligence is expensive* (about 20-30K per "normal" Q2W tract (Yellow Book appraisals)).
- Land trusts still can't hold legal interest unless full donation, but that may be changed eventually.

Benefits: 75% funding for acquisitions is more than a lot of state grant programs will pay; it will cover staff time (in certain categories), baselines (not in-house) and appraisals, which are often hard to cover.

Eight Step Framework for Tackling Multi-Landowner Projects with Forest Legacy Funding
Case Study: $7M Quabbin to Wachusett project, ranked 2nd nationally

1. PLANNING
   a. Find the coalescing interest
   - Tools: in person meeting, maps
   - Best Practice: Build a planning team and use it
   - *Q2W:* Held early meetings with likely partners to share landowner leads in overlapping geography (based on history of sharing priorities with neighboring conservation entities) and agreed on **four main criteria** for possible projects (BioMap2, drinking water supply, adjacency to conserved land, greater than 40 acres in size).

2. OUTREACH
   a. Tell the story
   b. Use a multi-faceted outreach approach
   c. Be strategic and coordinated
   - Tools: maps, meetings, events, handouts, mailings, phone calls
   - Best Practice: use principles of fairness and trust with partners and landowners, share resources
   - *Q2W:* Partners employed 1) Direct one-on-one outreach to existing leads/prospects by partners and key local champions (open space committee members, etc.), 2) followed by two large estate planning events in the project geography where Forest Legacy opportunity was mentioned and 3) strategic/coordinated outreach to best new landowner prospects split between partners. The "story" focused on protecting working woodlands that naturally filter the pristine drinking water for the 2.5 million people of metro-Boston.

3. PARTNER COORDINATION
    a. Identify a coordinator
    b. Delegate and follow through
    c. Share credit (agree early on about how project will be talked about publicly)
    - <u>Tools</u>: **regular check-ins** (more communication is better than less!)
    - <u>Best practice:</u> Be flexible and transparent. Build and maintain relationships rooted in trust.
    - *Q2W:* North Quabbin Regional Landscape Partnership (NQRLP) designated lead, had experience/successful track record and pre-existing trusting relationships with partners. Regular in-person meetings whenever key decisions needed to be made. Used excel sheets to track which partners had been in touch with which landowner prospects. Spent time getting municipal conservation commissions/city governments to support the project idea, application, and implementation.

4. FUNDING
    a. Decide who makes asks and submits proposals
    - <u>Tools:</u> collaborative fundraising MOU (if private dollars being sought), spreadsheets of potential funders
    - <u>Best practice:</u> be adaptive to opportunities that arise, read the scoring criteria, **leverage awarded Forest Legacy funds with other funding sources** (ex: MA Conservation Land Tax Credit program, MA DCR Forest Stewardship Cost Share program, other state funding sources)
    - *Q2W*: NQRLP wrote and submitted proposal (input/review provided by partners) and solicited many letters of support from elected officials. Partners agreed to leverage match/cost share whenever possible for each tract over which they were the "lead."
        i. ***Application tips*****:** Exceed the cost-share thresholds (i.e. ask Forest Legacy for less than 75% of project costs), hit at least **1,500-2000 acres**, reference USFS documents in application and use scoring criteria, coordinate with state program coordinator and state Forest Legacy Committee to make application as strong as possible, check in to see if other proposals are being submitted and **coordinate/stagger submissions** if possible to maximize funding success for your state. Only **one map** is permitted in a Forest Legacy application. It has to be cohesive. Figure out a good way to have realistic acquisition/budget numbers without spending a ton of money on a project that may not be awarded funding.

5. PROJECT MANAGEMENT SYSTEMS
    - <u>Tools:</u>
        - streamlined CR templates
        - signed options at time of application
        - purchase and sales once project funded
        - use timelines
        - use **comprehensive spreadsheet** for tracking budget and track status

- Best practice: have one contact person/coordinator when possible, clearly define roles, check in regularly with partners, anticipate bottlenecks
- *Q2W*: NQRLP organizes **weekly check-in calls** with partners and DCR Forest Legacy Coordinator to track progress, discuss issues and solutions. NQRLP also organizes in-person meetings when key decisions need to be made. DCR-Division of Water Supply hired attorney specifically to handle Q2W transactions and had designated stewardship and project management capacity—all three DCR-DWSP staff participate in partner check-ins.

6. LANDOWNER RELATIONS
   a. Time issues
   b. Minimize change when possible
   c. Keep landowners engaged
   d. Shared commitment, level playing field
   - Tools: quarterly newsletter, meetings, calls, invites to outreach events
   - Best Practice: **set the right expectations** from the beginning (this will take 3-5 years), continue to tell the story, reminders on project basics
   - *Q2W*: Circumstances for landowners changed over the course of the project and some landowners dropped out. Q2W partners kept likely landowner prospects in the wings to offer as replacements. Partners agreed to use original four project quality criteria to vet each potential new tract.

7. STEWARDSHIP
   a. Don't ignore it
   b. Prepare groups for responsibility (municipal trainings on monitoring/stewardship)
   - Tools: easement defense insurance, stewardship money
   - Best Practice: create/support training program for municipal holders (DCR organizes these specifically for Forest Legacy tracts); Plan ahead (find more than one contractor for baselines) when multiple tracts are closing in the same time frame
   - *Q2W:* Status of each track discussed weekly to help land trusts/DCR stewardship staff to plan for closings and avoid bottlenecks. Baselines were put out to bid more than once if bids were too high. Partners worked to encourage more baseline contractors to join the state-approved contractor list.
