

Fourteen people attended the Estate Planning Workshop. Although one attendee signed up to meet with an attorney, he did not choose to follow through. However, one of the elderly attendees (who had also attended the previous Woods Forum) did subsequently donate 8 acres of land to the Rensselaer Land Trust (an ongoing project).

*Strategy:* Estate Planning Workshop

*Landowner Group:* Working the Land Owners

*Desired Outcome:* To have landowners consider land conservation when developing an estate plan and to begin a discussion about the future of the land within the family and with an estate planning professional.

*Message:* “explore succession planning and the human side of estate planning and ... focus on family ties to the land from generation to generation.” The accompanying photo shows a family with a grown son surveying the land.

*Outreach:* Same 500 invitations mailed to landowners in the focal area for the Woods Forum and Estate Planning Workshop.

*Outcomes:*

Eleven people attended the Estate Planning Workshop. Six people, representing three families, met with an estate planning attorney for a free consultation and have begun the discussion within their families on the future of their property.

*Taconic Plateau to Indian Mountain:*

*Strategy:* Family Forest Owner Intergenerational Transfer

(Estate Planning Workshop)

*Landowner Group:* Woodland Retreat Owners in NY, MA, and CT

*Desired Outcome:* Landowners attend free Estate Planning Workshop, take advantage of free follow-up consultation with estate planning attorney and/or work with local land trust toward a conservation outcome for their properties.

*Message:* “Love Your Land? Make a Plan” and “Your Land. Your Estate Plan: A Free Workshop.”

*Outreach:* 800 postcards mailed to landowners in all three states. Posters in public places. Press releases. 100 phone calls to landowners (none of whom actually attended).

*Outcomes:*

Three recipients of postcards attended. A fourth read about the workshop in the shopper's guide (none from NY). A fifth could not attend but was one of the three landowners who subsequently took advantage of the estate planning follow up consultation. One landowner met with a land trust staff person

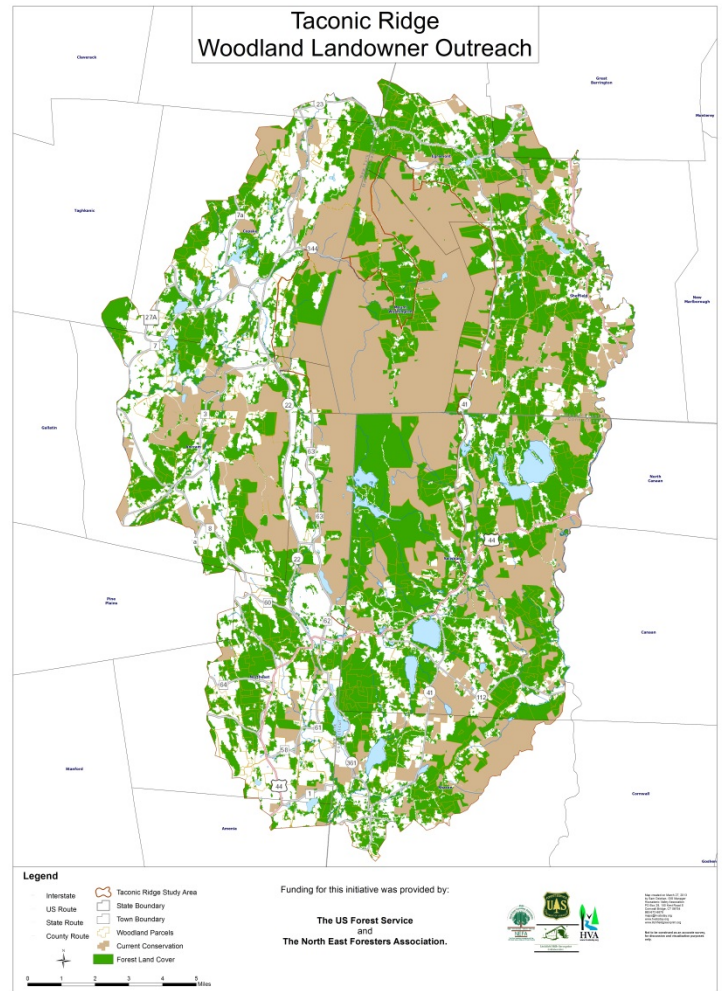


Figure 9: Map Showing Extent of the Taconic Plateau to Indian Mt. Focus Area in the Taconics Partnership

to talk about conserving their land. No one mentioned seeing any of the posters. Total acreage represented by the 5 landowners who took steps is 243 acres.



Figure 10: Postcard design used by partners in the Taconic Plateau to Indian Mt. Focus Area in the Taconics Partnership

*Strategy:* Woods Forum

*Landowner Group:* Woodland Retreat Owners in NY and CT

*Desired Outcome:* Landowners attend free Woods Forum, taking advantage of free follow-up consultation with naturalists/foresters, as part of the Forests for the Birds workshop (Strategy #3).

*Message:* "I care about my land. How can I care for my woods?"

*Outreach:* 275 postcards (advertising birds and pie) mailed to landowners in two states. Article in the local journal. Press releases. 100 phone calls to landowners (none of whom actually attended).

*Outcomes:*

Overall, 25 people attended (representing 17 unique properties) either a workshop, received the follow-up site visit/habitat assessment or both. Seven of the 17 properties represented by the 25 attendees received a follow up site visit by a forester (at least two landowners), a site visit by a naturalist from a land trust (three) or attended the Forests for the Birds Workshop and/or received a bird habitat assessment (two).

*Strategy:* Promoting Silviculture with Birds in Mind (Audubon

Bird

Habitat Workshop)

*Landowner Group:* Woodland Retreat Owners in NY and CT

*Desired Outcome:* 20 Landowners attend free Forests for the Birds Workshop for forest landowners at strategically

convenient location in Salisbury, CT, 14 take advantage of free follow-up bird habitat assessment on their properties. Audubon Connecticut and Audubon Massachusetts were the vendors for this workshop and the assessments and were entirely responsible for implementing this Strategy. Related desired outcomes include:

- Increase in awareness of conservation and management options.
- Attendance by family forest owners to Bird Workshop.
- Engagement of forests by family forest owners.
- Engagement of management and/or conservation practices by family forest owners.
- Acres of bird habitat assessments on family forests.
- Acres of NRCS cost-share for bird habitat improvements.

*Message:* Most effective message appeared to be that experts from Audubon, the Connecticut Agricultural Experiment Station, and certified foresters will provide a free assessment for what you can do to improve habitat for birds on their properties.



Figure 11: Postcard design used by partners in the Taconic Plateau to Indian Mt. Focus Area in the Taconics Partnership for a Bird Workshop

*Outreach:* Above postcard mailed to ~250 landowners within the greater focal area, but did not receive many participants from that mailing. An email blast to the Audubon Sharon listserv (text below), went to ~950 email addresses. 12 participants signed up from that outreach effort. During the week leading up to the workshop and needing additional participants, mailed messages to the Connecticut Environmental Leader List, the CTBirds listserv and posted a notice on the CT Audubon Facebook page to attend. Mass Audubon sent the postcard to about a dozen landowners in the target region. Mass Audubon connected with several conservation-minded organizations in the target region to compile a list of landowners who might be interested in the assessments and called each landowner personally to describe the program and inquire if they would be attending.

*Outcomes:*

Overall, 12 landowners attended the Bird Workshop on May 3, 2014. Six landowners received habitat assessments in the MA portion of the target region. Together these landowners own 750 acres of forested land. Though only half a dozen landowners received habitat assessments, a large amount of forest was assessed for bird habitat that most likely would not otherwise been looked at with this purpose in mind.



## 7.13 MA-VT Woodlands Partnership

Members of the MA-VT Woodland Partnership were most concerned with a) generational transfer of land (heirs have very different land ethic than owners) b) new landowners who have come from more urban areas and are less likely to understand their

commitments under current use programs, c) and the general lack of early successional habitat for birds, in particular. The group sought to address these issues using three main strategies.

These were: Family Forest Owner

Intergenerational Transfer, Promoting Silviculture with Birds in Mind, and New Family Forest Owner Outreach. They had one twelve-town focus area along the MA-VT state line, though there were activities run in each state.

*Vermont:*

*Strategy:* Family Forest Owner

Intergenerational Transfer (Woods Forum)

*Landowner Group:* Woodland Retreat Owners in VT

*Desired Outcomes:* Increase landowners' awareness of land conservation options and have them take the next step by engaging with a local attorney specializing in real estate and estate planning.

*Message:* "Family lands, part of your legacy," and "Shape the future of your land."

*Outreach:* A database and set of maps were developed for all 6 towns. A prospecting and general outreach letter was sent in March, 2014 from the Vermont Land Trust to 120 landowners of unprotected land (100 acres or greater) in the Current Use Program giving them information on the process of conserving land through easement donations.

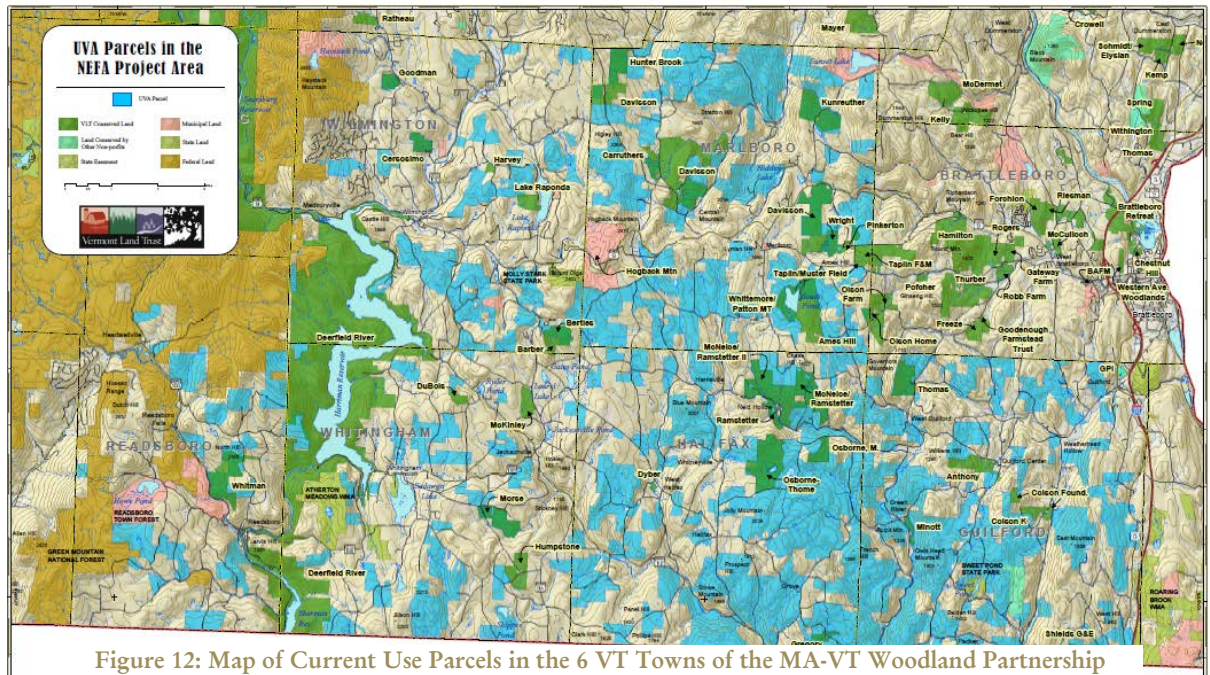


Figure 12: Map of Current Use Parcels in the 6 VT Towns of the MA-VT Woodland Partnership Focus Area

**Please join us!**

**Southern Vermont Woods Forum**  
**Wednesday, April 9, 7:00-8:30 PM** (snow date April 16)  
**Broad Brook Grange**  
**3940 Guilford Center Rd, Guilford, VT**

- Is your property enrolled in Current Use (also called Land Use and Use Value Appraisal)?
- Do you have a timber harvest scheduled?
- Are you confused by the Current Use program or wondering what a timber harvest involves?

Come share your questions and experiences. This informal discussion will be a chance to get advice and recommendations on all aspects of forest management, including wildlife habitat and recreational enhancement. Hear from the county foresters, staff from Vermont Land Trust and, most important of all, fellow landowners. We need you to be part of the conversation, so come tell us what's on your mind regarding your woods.



Refreshments will be served. For planning purposes, please let us know if you will be there by calling Pieter van Loon at Vermont Land Trust, 802-246-1502 or email [pieter@vlt.org](mailto:pieter@vlt.org).

Figure 13: Postcard design used by partners in the MA-VT Partnership

A Woods Forum on conservation-based estate planning was held in May, 2014 followed by legal consults for those in attendance who were interested in this program.

*Outcomes:*

Eight landowners attended the Woods Forum. Four landowners met with an attorney. Two landowners are considered by Vermont Land Trust as conservation easement donation prospects.

*Strategy:* New Family Forest Owner Outreach (Welcome Bags of Forest Stewardship and Conservation Information and Woods Forum on Current Use)

*Landowner Group:* Woodland Retreat Owners in VT, who recently acquired land that was already enrolled in current use.

*Desired Outcomes:* Increase awareness of land conservation and management options, visit with new landowners and deliver welcome bags, give advice in an informal setting, hold a Woods Forum on the Current Use Program and general topics within the field of woodland management.

*Message:* “keeping your woods healthy, protecting special places on your land and passing land on to future generations.”

*Outreach:* A 2-part mailing was designed to reach the targeted audience of woodland retreat owners who had purchased at least 50 acres in the last 5 years. First, a large (5x8 inch) post card was mailed to introduce the MA-VT Woodlands Partnership. A few weeks later a letter with return postcard was sent to draw interest in receiving a visit and welcome bag full of educational materials from a VT Coverts volunteer. Six months later a smaller postcard was sent to same targeted audience to see if they wanted just the welcome bag, either mailed or picked up at the VLT office with no visit. A large (5x8 inch) post card was mailed to a targeted audience of around 50+ landowners for the Woods Forum on Current Use Program and other topics. This list was developed by the County Foresters.

*Outcomes:*

There were only 46 new landowners (acquiring the land within 5 years) with land already in current use within the 6 VT towns. Of these, four requested a visit. Other welcome bags were distributed by a VT Coverts volunteer (four), sent by US Mail (four), distributed at a Woods Forum (eight), and at the annual “Strolling of the Heifers” event (fourteen).

*Strategy:* Promoting Silviculture with Birds in Mind (Audubon VT Bird Habitat Workshops). The primary strategy was to use forest breeding birds to educate landowners about the importance of forests for bird populations and how management can be used to improve breeding habitat. The implementation steps included: Training Mass Audubon staff in habitat assessment methods; Plan and deliver forester workshops in partnership with Mass Audubon; Plan and deliver landowner workshops; Provide habitat assessments on ten woodlots.

*Landowner Group:* Woodland Retreat Owners in VT

*Desired Outcome:*

- Attendance by family forest owners at Woods Forums (same ones as in Project 1).
- Increase in awareness of conservation and management options.
- Attendance by foresters in Foresters for the Birds Training.
- Engagement of foresters by family forest owners.
- Engagement of management and or conservation practices by family forest owners.
- Acres of bird assessments on family forests.
- Acres of NRCS cost-share for bird habitat improvements.

*Message:* The importance of Vermont and Massachusetts forests was highlighted due to the fact that these states have the some of the highest diversity of bird species breeding in the country and most of those are breeding in family-owned woodlots.

*Outreach:* To recruit landowners to attend workshops, they used postcards and ads in local papers. Most of the landowners who agreed to habitat assessments were recruited using existing networks such as the Windham Woodland Owners Association, County foresters, and the Vermont Land Trust. Information was also provided at the Strolling of the Heifers event. The most effective channel of communication was using peer-to-peer networks,

foresters, and partner networks. Individual contacts by an Audubon staff person, land trust staff or forester led to almost all of the individual habitat assessments.

*Outcomes:*

Audubon VT trained three Mass Audubon staff in their habitat assessment method, which enabled MA-landowners to receive habitat assessments. The Forester workshop held in Shelburne, MA in May 2013 was attended by 40 foresters and land managers. 19 habitat assessments were completed covering 4,408 acres. Three additional assessments (649 acres) were also completed outside the focus area. Landowners who had an assessment done also received a habitat assessment report and management recommendations and a copy of Audubon Vermont's "Managing Your Woods with Birds in Mind: A Landowners Guide." The majority of these landowners were recommended by consulting foresters through the county foresters. The first landowner tour was done in partnership with the Vermont Land Trust and the Windham Woodland Owners Association in October 2013, and was attended by 40 people. The second forest tour was offered on May 3, 2014 at the Hog Back Marlboro Town Forest and was attended by 15 people. These tours were publicized using local media and partner networks and mailing lists created by the project.

*Massachusetts*

*Strategy:* Family Forest Owner Intergenerational Transfer (Woods Forum)

*Landowner Group:* Woodland Retreat Owners in MA

*Desired Outcomes:* Identify and invite landowners (of 25 acres or more) enrolled in MA's Current Use Program, Ch. 61, to a Woods Forum focused on conservation-based estate planning and train consulting foresters in estate planning.

*Message:* "Family lands, part of your legacy," and "Shape the future of your land." For the foresters, our message was how to help their clients and keep forests here for future generations of clients.

*Outreach:* A database and set of maps were developed for all 6 towns. For the Woods Forum and Chapter 61 Forum, they sent postcards to all landowners with 25 acres and up in the focus area (480). They also advertised the events through the Franklin Land Trust E-newsletter and Facebook page. The Woods Forum postcard also included a notice of a Bird Walk to promote Mass Audubon's Bird Habitat Assessments. People who attended the first Woods Forum and an introductory estate planning workshop (not part of this grant) were sent letters and emails and received phone calls about the 1-1 sessions with an attorney. Foresters were contacted personally by phone and email.

*Outcomes:*

Two workshops (A Woods Forum and a Ch. 61 Forum) were held for landowners, one pre-training meeting and training were held for foresters, and three blocks of 1-1 sessions were offered to landowners. Overall, 480 landowners received postcards, 16 attended the Woods Forum, 14 attended the Chapter 61 Forum, 10 met with an attorney for a free legal consultation, and four are considered by Franklin Land Trust as conservation easement donation prospects. Four consulting foresters were trained in estate planning.

*Strategy:* New Family Forest Owner Outreach (Welcome Bags of Forest Stewardship and Conservation Information and Woods Forum on Current Use)

*Landowner Group:* Woodland Retreat Owners in VT, who recently acquired land that was already enrolled in current use.

*Desired Outcomes:* Increase awareness of land conservation and management options, visit with new landowners and deliver welcome bags, give advice in an informal setting, hold a Woods Forum on Current Use Program and general topics within the field of woodland management.

*Message:* "keeping your woods healthy, protecting special places on your land and passing land on to future generations."

*Outreach:* A 2-part mailing was designed to reach the targeted audience of woodland retreat owners who had purchased at least 25 acres in the last 5 years. First, a large (5x8 inch) post card was mailed to introduce the MA-VT Woodlands Partnership. A few weeks later a letter with return postcard was sent to draw interest in receiving a visit and welcome bag full of educational materials from local land trust staff and MA DCR State foresters. Six months later a smaller postcard was sent to same targeted audience to see if they wanted just the welcome bag, either mailed or picked up at the FLT office with no visit.

*Outcomes:*

There were 23 new landowners (acquiring the land within 5 years) with land already in current use within the 6 MA towns. Of these, three requested a visit. Ten welcome bags were distributed by a DCR Service Forester.

*Strategy:* Promoting Silviculture with Birds in Mind (Mass Audubon MA Bird Habitat Workshops).

*Landowner Group:* Woodland Retreat Owners in MA

*Desired Outcome:* Same as the Audubon Vermont's

- Attendance by family forest owners at Woods Forums (same ones as in Project 1).
- Increase in awareness of conservation and management options.
- Attendance by foresters in Foresters for the Birds Training.
- Engagement of foresters by family forest owners.
- Engagement of management and or conservation practices by family forest owners.
- Acres of bird assessments on family forests.
- Acres of NRCS cost-share for bird habitat improvements.

*Message:* They highlighted the importance of Vermont and Massachusetts forest due to the fact that we have some of the highest diversity of bird species breeding in the country and most of those are breeding in family-owned woodlots.

*Outreach:* Franklin Land Trust put together a list of landowners who owned more than 25 acres of land, were not already managing for wildlife, and who they thought would be good candidates for the habitat assessments (based on interest in birds and conservation). Mass Audubon created some fliers and a short application for the bird habitat assessments that Franklin Land Trust sent out either via email or mail. A few landowners became interested in the assessments after speaking with Mass Audubon about them while on a Habitat Walkover held in 2013. Landowners received Vermont's "Managing Your Woods with Birds in Mind" guide, as well as fact sheets for the Birder's Dozen and Responsibility Birds. A list of additional sources to read for more information was also sent to the landowners.

*Outcomes:*

Overall, 39 foresters were trained to manage with birds in mind at the May 3, 2013 training workshop (same May workshop described for VT above). 15 landowners attended the bird workshop on May 3, 2014. 12 landowners attended the habitat walkover on May 12, 2013. 10 landowners received bird habitat assessments in the MA portion of the target region. Together these landowners own 885 acres of land.



## 7.14 Quabbin to Cardigan (Q2C) Partnership

The Q2C Partnership decided to support two sets of activities (one in NH (two focus areas) and one in MA) linked by the larger context of the Q2C Partnership region and existing focus areas. Both sets of projects focus on engaging Woodland Retreat owners to address the issue of habitat fragmentation and the lack of long-term forest management planning among family forest owners. Residential development, climate change and insect pests constitute the major threats to the Massachusetts forests in the Quabbin to Cardigan (Q2C) initiative. The North Quabbin Regional Landscape Partnership focused primarily on the threat from parcelization, fragmentation and development of our area's forests.

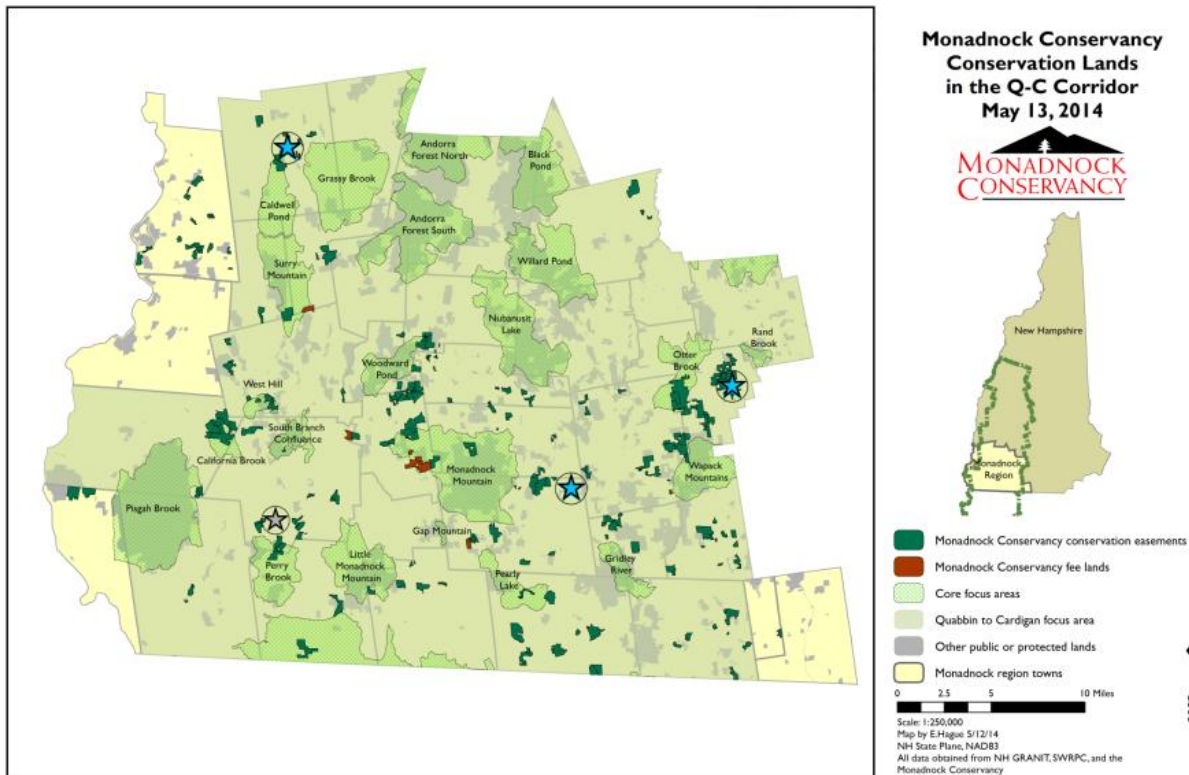


Figure 14: Map of the Conserved Lands in Monadnock Conservancy's territory of the Quabbin to Cardigan Partnership

*NH Focus Areas: Monadnock Conservancy—Reaching Out to Landowners Who Own Land with Conservation Easements*

*Strategy: Woods Forums (three in all).*

This strategy actually involved a suite of associated sub-strategies:

- Engage “model owners” to host Woods Forums, to invite peers and to share “takeaway” resources.
- Invite all Monadnock Conservancy landowners with easements (estimated at 140) to participate in a Woods Forum.
- Develop “takeaway” resources for attendees (*More than a Woodlot*, landowners’ stories, and the landowner information kit).
- Printed materials for use for face-to-face distribution, mailings, and on websites and social media (Facebook and twitter).



- Personalized letters to easement holders inviting them to a Woods Forum and informing them of sources of information and assistance.
- Landowner stories (3 printed and/or video for website and hard copy use).
- Develop a landowner information kit on specialized management topics (getting started, invasives, field management, how important are important forest and agricultural soils, managing forests in and around water).
- Develop a landowner resources section of the Monadnock Conservancy website.
- Establish a demonstration Forest—The Maynard Forest in Gilsom is a 90-acre forest owned by the Conservancy. It is managed by a consulting forester; has a forest stewardship plan; a timber sale; and the beneficiary of EQIP federal financial assistance.
- Erect kiosk with maps, descriptions of management activities, and QRcode.
- Conduct field tours, signage, etc.

*Landowner Group:* Woodland Retreat Owners (Woods Forums and printed materials) and Working the Land Owners (printed material, workshops, and demonstration forest)

Desired Outcomes:

- 10 landowners request a visit from their County Forester
- 10 landowners engage the services of a forester
- 5 have a forest management plan written
- 10 conduct at least one management activity

*Message:* “Got Woods? Got Questions?” was used as a non-technical reference to woods. “Hear land ownership stories from other owners of conserved forests,” highlighted the idea that attendees would be hearing from people like them.

*Outreach:* For each Woods Forum, at least one landowner peer hosted the forum and, in most cases, did the inviting. Woods Forums got the Woodland Retreat Owners in the door. Information kits and sheets in non-technical language for both landowner groups were developed. Woods Forums were publicized to Woodland Retreat Owners using postcards. They also promoted them through Extension’s channels including Facebook and twitter. Email invites were sent to 190 Monadnock Conservancy landowners who were their targeted group. Postcards were sent. Follow-up phone calls were made in some instances. Press releases were used and at least one feature article appeared. Personal contacts were made. The Alstead Conservation Commission gave personal invitations to an estimated 150 additional landowners. Personal invitations proved to be the most fruitful recruiting technique. The demonstration forest, kiosk, and QRcode, were used in association with the Red Oak Management and the Foresters for the Birds workshops, which targeted “Working the Land Owners” and the professionals who help them. The topics and workshop content for these two workshops were information-heavy and technical.

*Outcomes:*

91 landowners, 15 foresters attended the Red Oak and Forester for the Bird workshops. See appendix for abridged results of Forester for the Birds evaluation indicating the majority would be more likely to take positive action as a result of the workshop. The red oak workshop wasn’t evaluated. No follow-up done with these workshops.

31 landowners attended Woods Forums

10 contacted a county extension forester for assistance with their land

9 engaged the services of a licensed forester

6 had a forest management plan written

11 conducted a management activity on their property

1 landowner became a Coverts Cooperator

*NH Focus Areas: Ausbon Sargent Land Preservation Trust— Reaching Out to Landowners Who Haven't Permanently Protected Their Land*

*Strategy:* Conduct a landscape analysis to identify landowners for targeted contact in the Q2C focus areas and Q2C supporting landscape with potentially high quality conservation projects through tax maps and aerial photography and Woods Forums (6 in all). This strategy actually involved a suite of associated sub-strategies:

- Engage “model owners” to host Woods Forums, to invite peers and to share “takeaway” resources.
- Using the landowners identified in the landscape analysis, conduct targeted outreach inviting them to one of the Woods Forums through personal letters, emails, and phone calls.
- Develop “takeaway” resources for attendees

*Landowner Group:* Woodland Retreat Owners

*Desired Outcomes:*

- 15 landowners agreeing to be contacted by staff
- 7 site visits by land trust staff
- 2 commitments to conserve land

*Messages and Relation to Audience:*

**Message**

Do you love your land and value your woods?  
 Discuss how to care for your woods today and plan for the future of your land.  
 Talk with other local landowners, hear about their experiences  
 Share your questions, concerns, advice  
 Meet local conservation and forestry professionals  
 Light refreshments served.

**Relation to Audience**

Appeal to landowner interests  
 Appeal to landowner interests  
 Learn from your peers  
 Become a part of a peer group  
 Become a part of a peer group  
 Informal, non-threatening atmosphere

*Outreach:* Very similar approach as was done for the Woods Forums in the other NH focus area.

*Outcomes:*

- 400 landowners were identified through tax maps and sent a postcard
- 49 landowner families attended a Woods Forum
- 18 new landowner relationships started
- 10 landowner visits
- 8 landowners actively considering conserving their land

**MAP OF AUSBON SARGENT FOCUS AREA**

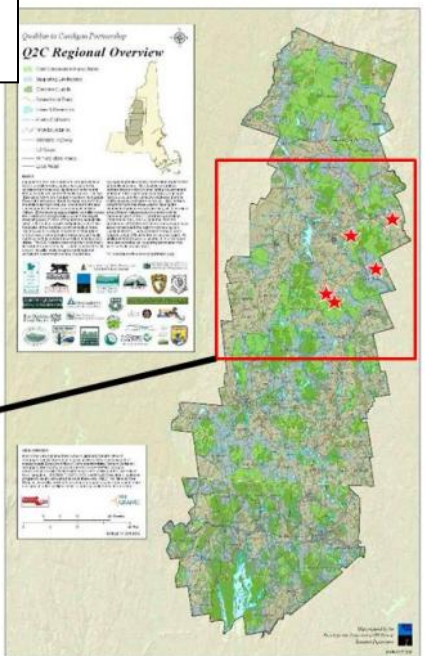
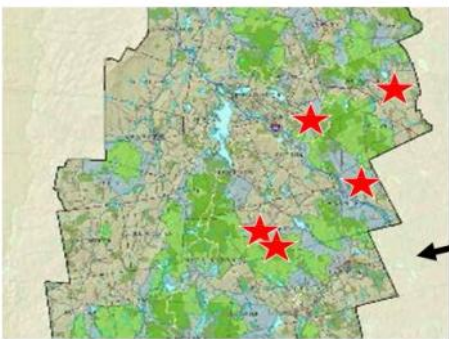


Figure 15: Map of the Focus Areas in Ausbon Sargent’s territory of the Quabbin to Cardigan Partnership

Massachusetts

Strategy: Forest Stewardship Program Landowner Network or “Stew Club” landowner engagement meetings – 4 meetings total.

*Landowner Group:* Woodland Retreat Owners with Forest Stewardship Plans

*Desired Outcomes:* 15 landowners attend; and are educated about a) resources to implement their Forest Stewardship Plan goals and b) conservation options; 7 of landowners take concrete steps to implement their Forest Stewardship Plan (FSP) goals, which may include utilizing EQIP, WHIP and other wildlife habitat improvement programs; 3 landowners take concrete steps towards permanent conservation of their land. The partners involve DCR Service Forester.

*Message:* “Caring for the land.”


*Outreach:* Postcards were delivered by mail to 325 landowners with Forest Stewardship Plans in the area. Local supporters from the Keystone training, members of local town municipal boards, and supportive landowners were also asked to invite people individually by phone or in person.

*Outcomes:*

325 landowners were sent 4 postcards for 4 unique Stew Club events. Between 10 and 50 people were called prior to the event. 47 landowners attended a Stew Club. 19 landowners are moving forward with a concrete action (meeting with a land trust, implementing their forest stewardship plan, applying for an NRCS grant, pursuing a Conservation Restriction, meeting with an estate planning attorney).

## NORTH QUABBIN STEW CLUB

Good food. Good people. Good ideas.



**Sunday, March 2, 2014**  
At the home of Abbie Rorer & Charlie Buell  
In Petersham, MA

**Agenda**

2:00 pm Meet & Greet  
2:30 pm Walking Tour of the Property  
5:00 pm Dinner and Discussion!

**What to Expect**

Join us for an on-site tour of Abbie and Charlie's land. Come see a woodlot marked for harvest, wildcrafted highbush blueberries, check out neighboring Harvard Forest Climate Change experiment, and see Abbie's rare plants greenhouse.

“Stew” represents three things: land *stewardship*, stew for nourishment, and stewing of ideas. We are a group of people who talk about the joys and challenges of caring for land, swap ideas and resources, and share great food.

Please RSVP or call for more info: Matthias Nevins,  
978-248-2055 x27 and [conservationist\\_ameri Corps@mountgrace.org](mailto:conservationist_ameri Corps@mountgrace.org)

Figure 16: Flyer for the Stew Club for the North Quabbin Regional Landscape Partnership of the Quabbin to Cardigan Partnership

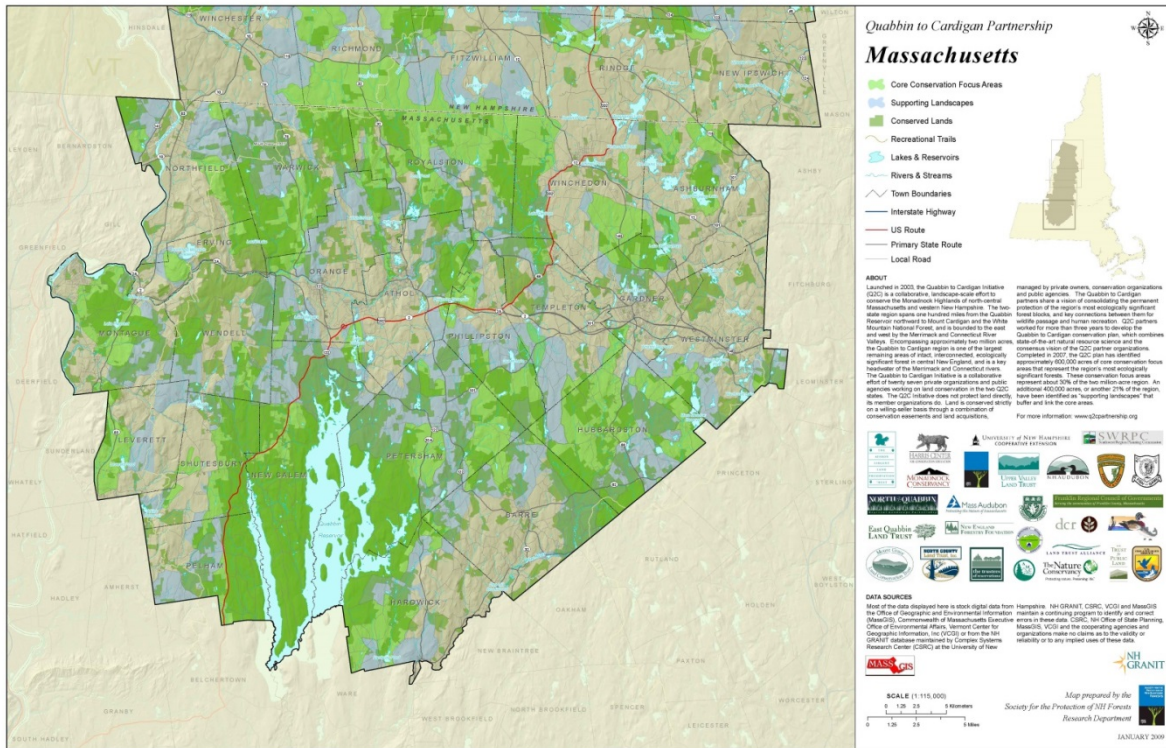


Figure 17: Map of the North Quabbin Regional Landscape Partnership of the Quabbin to Cardigan Partnership

**Strategy:** Landowner Neighborhood Gatherings— 4 meetings total.

**Landowner Group:** Woodland Retreat Owners

**Desired Outcomes:** “Model” landowner hosts meeting and helps recruit 10-15 landowners to attend a social gathering where landowner also shares information about why they conserved their land or why they are inclined to. Galvanizing conservation scenario presented, which may include a future Forest Legacy or Massachusetts Landscape Partnership Grant application, and the MA state income tax credit for land conservation. 2 separate events, total of 20 landowners, 5 landowners take steps to conserve their land.

**Message:** For the Hardwick Neighborhood Gathering, handwritten letters were sent by the host. For the Pelham Neighborhood Gathering, a more formal invitation was sent by the host, with hand addressed envelopes. The letters stressed words like “your family,” “legacy,” and others that reach Woodland Retreat Owners.

**Outreach:** hand-written and addressed landowners sent by “model” Woodland Retreat Owners

**Outcomes:**

As a result of mailings, phone and email conversations, and the Pelham, MA event itself, all 6 landowner attendees indicated interest in pursuing a conservation project (acreage of those 6 landowners is 169 acres) and 6 landowners who did not attend also expressed interest. 17 landowners attended the second event that provided info on the MA Conservation Tax Credit Program.

**Strategy:** Enhancing recreational values on your land tour, or “Land Tour”

**Landowner Group:** Woodland Retreat Owners

**Desired Outcomes:** 20 forest landowners educated about recreational land management options for their land.; 5 of landowners take concrete steps towards managing their land; A “Model” landowner hosts event, and helps recruit 20-40 landowners to attend tour where landowners visit 1-3 properties demonstrating trail design and building/ or pond design and building; Forest Stewardship program and NRCS programs promoted.

**Message:** After “pond building” tour failed to attract interest, a “permaculture” workshop was offered. Woodland retreat landowners might approach land management under this relatively new term.



*Outreach:* Postcard sent to any landowner with 10 acres or more in an 8-town region.

*Outcomes:*

Two landowners host an event that attracted 19 landowners (none with significant acreage). Four of the 19 landowners are moving forward with either by meeting with a land trust, implementing permaculture on their land, applying for an NRCS grant, meeting with an attorney, pursuing a CR, etc.



Figure 18: Postcard for the Forest and Farm Tour for the North Quabbin Regional Landscape Partnership of the Quabbin to Cardigan Partnership

*Strategy:* Planning the Future of our Land Estate Planning Workshops with One-on-One Meetings with Estate Planning Attorneys

*Landowner Group:* Woodland Retreat Owners

*Desired Outcomes:* 2 events that prioritize landowners from Q2C Focus Areas and Supporting Natural Landscapes; 30 landowners educated about land management and land conservation options; 7 landowners take concrete steps towards land management or land conservation; “Model” landowners and KEYSTONE trainees recruit 30-60 landowners; Peer landowners sign invitations, make follow-up one-on-one invites; Ideally, timed in response to a current issue (storm damage, invasive species, tax time (chapter 61), FSP funding announcement, etc.); 1 event.

*Message:* Used words such as “legacy” and avoided phrases like “timber harvesting income.”

*Outreach:* Postcard sent to 2931 landowners with personal invitations from Model landowners that brought in Working the Land Owners. Calls were made to 200 potential attendees.

*Outcomes:*

245 landowners attended 5 Estate Planning Workshops. 20 landowners met with an attorney in one-on-one sessions. 52 landowners are moving forward with an action (meeting with a land trust, applying for an NRCS grant, meeting with an attorney, pursuing a CR). 765 acres are in the process for land protection.

*Strategy:* Woods Forums

*Landowner Group:* Woodland Retreat Owners

*Desired Outcomes:* 30 landowners (educated about land management, land conservation, and other estate planning options; 7 landowners take concrete steps towards estate planning including contacting a forester or land trust or estate planning attorney, enrolling in chapter 61, etc.; “Model” landowners and KEYSTONE trainees recruit 30-50 landowners; 12-16 landowners meet one-on-one with estate planning attorneys.

*Message:* Similar to other strategies.

*Outreach:* Sent postcards to everyone with 10 acres or more in eight towns and local leaders called 55 individuals. 40 Posters were hung in key places around the 8 towns.

*Outcomes:*

98 landowners attended 1 Woods Forum Estate Planning Workshops. So far, 80 acres are in the process of getting protected as a result of the event. More follow-up is needed.

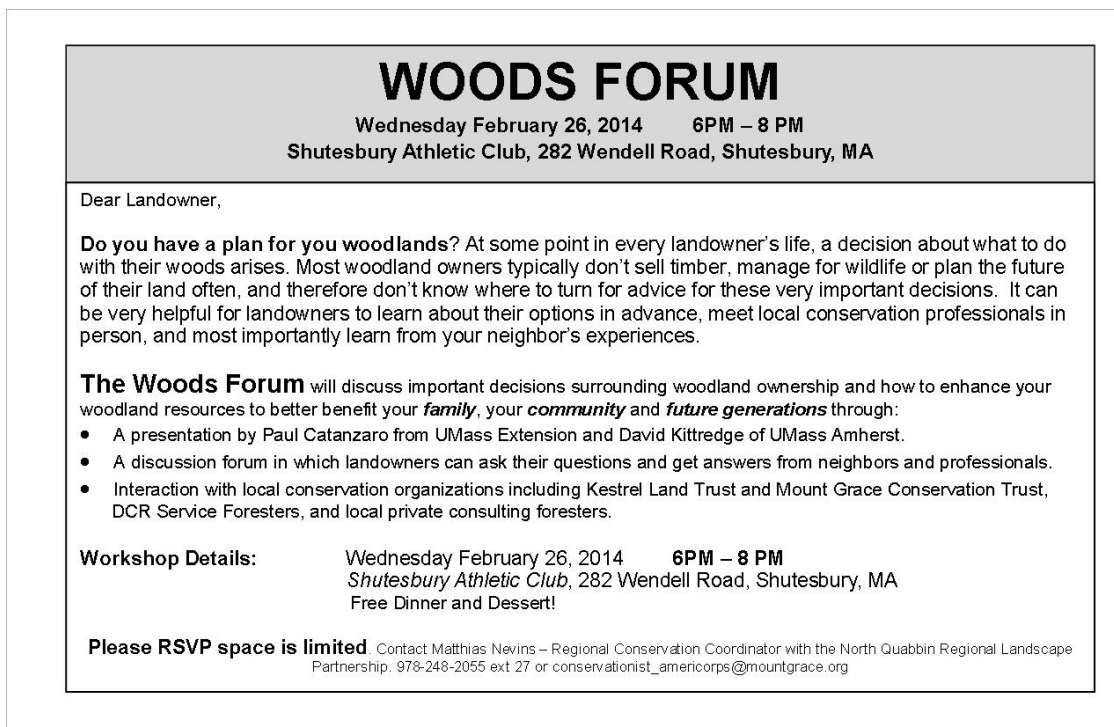


Figure 19: Post Card for a Woods Forum for the North Quabbin Regional Landscape Partnership of the Quabbin to Cardigan Partnership

*Strategy:* Open Space Committee Conference

*Landowner Group:* Not applicable. Audience was Municipal Open Space Planning Committee members

*Desired Outcomes:* 1 event that prioritizes volunteer municipal board members from Q2C Area, and other priority areas of the Keeping Forests as Forests grant (Mass Conn, Deerfield Watershed, Taconics); 50 volunteer Town Board members learn about land management and land conservation options; 10 Volunteer Town Board members take steps to help landowners conserve or manage their land; 10 Volunteer Town Board members take steps to help their municipality conserve or manage



Figure 5: Open Space Committee Conference

their lands, with an outreach component for project to serve as a model for landowners in the community. Conference goals included: 1) encourage towns to establish a town forest, 2) encourage towns to actively manage existing town woodlands 3) encourage and train town board members and citizens to pursue land conservation projects 4) train town board members and citizens in landowner outreach tactics, and 5) present information about SFFI messaging work. Invite “peer” presenters to share experiences with attendees in a variety of workshops with the above goals in mind, with possibilities including 1) how to organize a landowner outreach event, 2) effective messaging, 3) forestry tools and options, 4) land conservation tools and options, 5) Town Forest stewardship (with site visit), and 6) woodland stewardship and conservation funding tools.

*Messaging:* Not specific to attitudinal groups

*Outreach:* 2 mailings went out to all Massachusetts cities and towns. Some recruitment calling also occurred.

*Outcomes:*

55 municipal volunteers attended conference. Nine attendees are moving forward with concrete actions.

Overall, 225 acres in the process for land protection.

*Strategy:* Forestry Café—based on the Science Café model, which uses a game show model to educate people—is a fun family event to educate folks about the landscape, what foresters do, forest ecology, wildlife, forestry, land conservation.

*Audience:* kids and their parents, goal of 20 teams of 2. Look at 4-H quiz bowl & forestry invitational for other ideas.

*Team up with a grade or a classroom.*

*Landowner Group:* Woodland Retreat Owners

*Desired Outcomes:* 25 landowners and their 20 children are educated about land management (forestry) and land conservation information; 5 landowners take concrete steps towards land management and land conservation.

*Message:* Similar to other strategies.

*Outreach:* Posters, phone calls to teachers, advertisement in the paper, and social media were used to spread the word.

*Outcomes:*

12 landowners and 13 teenagers attended 1 event. Follow-up is needed.

## 7.15 Southern New England Heritage Forest (SNEHF) Partnership

The SNEHF Partnership considered the main threats to forests in their region to be forest conversion and fragmentation and poorly managed or under-managed forests. The group is addressed these issues using one main strategy (Woodland Ambassadors) in each of the three focus areas:

- MassConn Central – Monson, Wales, Holland, MA; Union, Stafford, CT;
- Northern Connections – Palmer, Ware, Ludlow, Belchertown, New Braintree, Granby, West Brookfield, Brookfield, Warren, MA;
- Tri-State – Douglas, MA; Thompson, Putnam, Killingly CT; Burrillville, Glocester, Foster, Scituate, RI.

*Strategy:* Woodland Ambassadors - Train “Woodland Ambassadors” in organizing landowner events, conduct outreach to unengaged “Woodland Retreat” landowners within the focus areas. The general approach for this project was to conduct low-key, non-technical, peer-to-peer outreach through small group events such as Woods Walks and Woods Forums on Woodland Ambassadors’ properties.

*Landowner Group:* Previously unengaged Woodland Retreat Owners with 5-50 acres of forestland within the three focus areas.

*Desired Outcomes:* Encourage previously unengaged “Woodland Retreat” landowners to take the first steps towards forest management and conservation by working with experienced, knowledgeable and committed forest owners (Woodland Ambassadors).

*Message:* “You Love Your Woods – What’s Their Future?” was used throughout the course of the project.

*Outreach:* Two coordinators worked with each Woodland Ambassador to develop an outreach plan specific to each event. All materials included the message, “You Love Your Woods – What’s Their Future.” MassConn employed a variety of methods to reach Woodland Retreat Landowners, ranging from direct mail and email to listserves, personal communications, and social media posts. The Last Green Valley also used direct targeted mailings, based upon landowner connections, databases, and the GIS maps, land trust mailing lists, one paid advertisement, two press releases, and one newspaper calendar listing. Overall, 3,753 landowners were reached via direct mail; 797 via emails; 3690 via listservs; 42 landowners contacted via personal communication from Woodland Ambassadors; 11 media stories on events, 1 paid ad, 2 press releases, 1 calendar listing.

*Outcomes:*

- 30 landowners trained as Woodland Ambassadors
- 22 events (8 woods walks and 4 estate planning events) were led by Woodland Ambassadors
- 305 landowners attended Woodland Ambassador events.
- 9 Previously unengaged landowners contacted a consulting forester
- 4 initiated a forest management plan
- 1 enrolled in current use programs
- 3 contact land trusts to learn more about conservation options
- 5 consulted estate planning professionals.



Figure 21: Newspaper advertisement for a Woodland Ambassador Event put on by the Southern New England Heritage Forest Partnership

## 7.2 Issues Experienced by RCPs Implementing their Work Plans and Solutions



Partners understood that once they began implementing their strategies, issues would undoubtedly arise. In fact the first All-Landscape Group Meeting on May 1, 2013, was designed to help people adapt their plans to foreseen and unforeseen issues. Table 1 is a compilation of the main issues and how they were addressed by one or more partnerships.

**Table 1: Common Issues and Solutions for RCPs Implementing Work Plans and Strategies**

<i>Issue</i>	<i>Effective Response</i>	<i>Number of Occurrences</i>
Poor response of initial mailed invitation	Personal follow up phone calls, other attempts	Taconics-Central MA-VT Woodland Partnership
GIS maps and database not compatible across state lines	Separate maps and databases by state	Taconics - North
Finding Peer Group Leaders	Forgo approach	Taconics - North
Landowners living in remote areas, on borders, valuing privacy	Limited follow-up communication if requested Reach out to partner NGOs and other NGOs to pull together list of potentially interested landowners in a focus area.	Taconics –North MA-VT Woodland Partnership Taconics - South
Lack of coordination or choosing to coordinate (and picking a less than ideal date for the event) with other groups running similar events which either led to saturation or which sought to avoid saturation.	None taken. Could be solved in the future by engaging the parties in the RCP. Coordinate with other NGO doing same kind of event.	Taconics-North Taconics-South
Competition with other kinds of events in the community.	Promote in many different ways: Evites and press releases alone didn't work, but phone calls and feature news articles increased attendance.  Partnering with a local Conservation Commission, and or a peer leader.	Quabbin to Cardigan Partnership - NH
Issues raised in Woods Forums beyond scope	Consider an issue-focused Woods Forum in the future.	Taconics-North
Availability of Service Foresters for Woods Forums	Landowner/Consulting Forester served as an effective substitute.	Taconics-North
Risk of having experts overwhelm landowners with too much information or too technical	Have your own NGO/Extension experts develop a solid guide for outside experts to follow.	Quabbin to Cardigan Partnership - MA
Landowners are not crossing state lines	Hold two events, or wish you had, one in each state.	Taconics-North Taconics-South
Turnover in key NGO staff affected timing of events and follow-up activities	Wait until new staff are ready and do the best you can, given the tight time frame, combine events: e.g. Woods Forum, then Bird Assessments. Very challenging but done.	Taconics-South Southern New England Heritage Forest Partnership
Large % of out-of-state landowners (40%)	Using the mail is challenging; Some groups advertised events seasonally to capture the second-home landowners.	MA-VT Woodland Partnership
Concern that consulting foresters would not attend an estate planning workshop.	NGO held an informal meeting with foresters to gauge interest, then used discussions to design a more engaging session for them.	MA-VT Woodland Partnership

<i>Issue</i>	<i>Effective Response</i>	<i>Number of Occurrences</i>
Large landscape too big to brand, or use as motivation for landowner engagement.	Focus on smaller areas of the larger landscape.	Quabbin to Cardigan Partnership - NH
Keeping the Woods Forums informal yet facilitated	Practice. Partners got better as they did them.	Quabbin to Cardigan Partnership - NH
Landowner attendees of Woods Walks having mobility issues	Have a host landowner with well-groomed trails and or vehicles.	Quabbin to Cardigan Partnership - MA
Brand new multi-state partnership	Much planning and developing products from scratch.	Southern New England Heritage Forest Partnership
Most Peer leaders or Woodland Ambassadors, don't have time/interest to lead their own events without considerable hand-holding	By design or default, NGO serves as lead, WA provides key supporting roles.	Southern New England Heritage Forest Partnership

### 7.3 Benefits, Lessons, and Recommendations of RCPs based on Key Strategies

The following section summarizes the benefits, lessons, and recommendations experienced by all the RCPs for each of the main strategies: estate planning workshops, Woods Forums, new landowner outreach, Silviculture for the Birds, Woodland Ambassadors, and other landowner events.

#### 7.31 Strategy: Estate Planning

##### *Benefits:*

- Encourages landowners to begin thinking about the future of their land.
- The free information was appreciated as was the pie and coffee and the opportunity to connect with other local landowners.
- Despite this being a very complicated topic, the event opened up a dialog between the landowner and the NGO and/or GO.
- “One-on-one” sessions with an attorney regarding conservation-based estate planning are valuable and productive and would not have happened otherwise.
- Training foresters in general aspects of estate planning will impact landowner conversations in the future.
- Franklin Land Trust and Vermont Land Trust will stay in touch for potential joint bi-state conservation projects and strategic conservation planning.
- Professionally, we got to know each other better and learned how things are done in our respective neighboring states. This will make it easier to cultivate any further cross-state work in the future.
- The database and maps were useful for generating mailing lists, and will be used for additional outreach in the future.
- A number of land conservation projects have come out of these events.
- Federal, state, and non-profit sources may provide some financial support for this coordination.

##### *Lessons*

- One-hour consultations with attorneys are not broadly popular.

- Difficult to engage landowners in thinking about their mortality and in this complicated, tax-related way.
- Bulk mailing was ineffective at attracting attendees.
- Personal calls can be more effective to recruit people to the event.
- Combining events with other funded efforts in the region can save money and lessen saturation, but may have other costs/ramifications.
- We gained insights into each other’s geographic areas and State programs.
- We realized in the early stages that timing of events was critical-- woods forums, legal consults, forester trainings, bird tours were all getting planned—and we did not want to overwhelm our audience.
- People respond to “free” services as an incentive to participate. For example, offering a free legal consult for the first 10 people to register to an estate planning workshop was an effective technique.
- Have a template for Attorneys to follow and to keep them to 30 minutes of talking, more for questions.
- Creating property maps for attendees that show important natural resources is time intensive, but attendees really appreciate it and it helps the initial conversations at the event with land conservation specialists move ahead much quicker.
- Another tip is to advertise that the event will run for 2 hours but end 30 minutes early for dessert, and people will stay around and have those essential conversations with their peers and with the professionals in the room.
- It also didn’t hurt to say that everyone who attended received a free dinner.
- Signing up people at the event to meet with an estate planning attorney worked well – it keeps the momentum up and moves people one more step towards conservation.
- A peer landowner who has been through the process and can share their story is essential. Having local leaders recruit attendees makes all the difference.

#### *Recommendations*

- Service forester should be present for current use questions, peer landowners to share their experience with it.
- Schedule Estate Planning events after Woods Forums.
- Presenting at least some of the information regarding estate planning at a Woods Forum might encourage more people, and younger ones who do not yet have a plan, to consider estate planning.
- Coordinate and communicate better between agencies to minimize the risk of saturation (two agencies running similar events in the same region at the same time). Have these agencies be part of the RCP in the future.
- Continue to track Open Space Institute funding possibilities and USFS designation in northwestern MA.
- Keep providing ways through educational workshops for people to understand conservation-based estate planning. Another possible tactic might include “one-on-one” consults where a landowner meets with an attorney and land protection specialist in the same session.

### **7.32 Strategy: Woods Forum**

#### *Benefits*

- Goodwill to benefit the NGOs. Information regarding conservation easements, forestry practices and a list of local contacts has been distributed to landowners.
- Created a new landowner constituency for woodlands that lie across local and regional administrative boundaries.
- The single most valuable outcome is the desire for these landowners to meet again and we intend to convene further.
- Our partners made new connections to landowners and strengthened old ones.
- The Woods Forum is a great way to show how conservation and woodland management can work together.

- This project enabled us to test the value of Woods Forums and targeted and intensive outreach helping us to learn new techniques and practice and improve on new and old outreach techniques.

### *Lessons*

- Personal calls/invitations were the most effective way to get people to attend.
- Community partners are essential: easement donors, conservation commissioners; Coverts volunteers; land trust board members.
- Informal message brings a different audience.
- Offering a free forester site visit was a valuable takeaway.
- Landowners have a negative perception of NY's current use program.
- If in an interstate landscape, choose a site near state line.
- Combine Woods Forum with another like opportunity for Bird Habitat Assessments.
- Pie, Coffee, and Birds work to get landowners in the door and to talk.
- Targeted and intensive outreach using non-technical language can appeal to the woodland retreat demographic more effectively.
- Landowner identification is time-consuming AND valuable.
- Targeting the message to desired audience works.
- Having a number of local leaders involved from the very beginning in planning an event and outreach for the event paid off with a large attendance for the event.

### *Recommendations*

- Follow-up and engage Woods Forum attendees in other events that can facilitate their actively stewarding or conserving their land. Then help them become peer leaders.
- Consider changing the venue of meetings to an outside location like a demonstration forest and advertise that free consultations with a professional forester will be available to all attendees.
- Find a Working the Land landowner to make calls to encourage attendance.
- Call landowners who attended and had a positive experience (such as a forester site visit) and ask them to call just one or two neighbors to invite them to future events.
- Woods Fora that combine bird habitat assessments with a friendly meeting environment and excellent food offerings worked well for a meeting held on a Sunday afternoon.
- Continue to use Woods Forum format for woodland owners with land trust and state forestry staff as cooperators.
- Create partnerships between the State service forestry program, a land trust, and local conservation commissions.
- Enlist landowner peers to recruit people to attend programs, but also to share knowledge and experiences outside of the "official" outreach settings.
- Identify a focus area and target audience of landowners.
- Design simple messages to attract your audience to a Woods Forum.
- Use peer to peer networking and desire to help them with problem-solving.
- Identify community members who will call, visit and write notes on invitations.
- Limit attendance to 15-20 for the best interaction.
- Provide food and time for networking before and after the sit down portion of the forum.
- Have a map of the focus area available so folks can show where their land is located.
- Follow-up after the meeting with information about topics of interest to individual landowners.
- Touch base periodically to see what progress is being made.



- 100 people is probably the maximum number you would want for an event like this. It was probably too large for some people to feel comfortable sharing ideas.

### 7.33 Strategy: Silviculture with Birds in Mind

#### *Benefits*

- Birds are a very effective “hook” for getting landowners interested in taking a more active role in managing their woodland property.
- Almost every landowner who was contacted about the bird habitat assessments was very enthusiastic and interested in having one completed on their property.
- The landowners seem to really love finding out what birds are nesting on their property, how “friendly” their woods are for birds and other wildlife, and how they can improve the habitat on their property.
- The NEFA grant helped Audubon VT to expand its forest bird work to Massachusetts, which is something this group had wanted to do for some time.
- The NEFA grant also helped Mass Audubon and Franklin Land Trust get a DCR grant to do forester trainings and to create a forester toolkit for Massachusetts.

#### *Lessons*

- Word-of-mouth approaches from local land trusts (or other local organizations) and neighbors were the most effective method for attracting landowners to the program.
- Better to conduct these efforts over a longer timeframe to allow for completion of assessments within the favorable window of opportunity for field work to assess breeding birds.
- On-the-land events (bird tours & habitat assessments) work better to engage people than mailings.
- We learned to streamline our bird habitat assessment process so that the landowners received their habitat assessment within a few days of the field visits.
- The habitat “walk over” tours are very effective at generating local interest.
- We learned existing networks (word-of-mouth approaches through county/state foresters, land trust staff, and neighbors) were the most effective ways to engage landowners. Only 1 or 2 assessments came from postcards and other direct mailings.

#### *Recommendations*

- More training for Audubon staff conducting the assessments about current use programs and other ways for the landowners to move forward so the staff could have more informed conversations with the landowners about why they should proceed with our recommendations for their property.
- It would be good to institute some sort of follow-up phone call with the landowners a few months after the report has been sent to hear if they have any questions or want help following through with suggestions.
- Future funding should be geared to deliverables on the ground and not so much the methods of reaching people.
- Continue bird habitat assessments and reach out to landowners who complete them for possible candidates for conservation easement donations.

### 7.34 Strategy: New Owner Outreach

#### *Benefit*

- Some excellent resource materials were shared via the welcome bags. For those who did receive the bags, they were well received.

## *Lessons*

- Out-of-state landowners are difficult to engage.
- Some “new” landowners were not actually new but had bought more land in their town.
- New landowner is too narrow of an audience to engage.
- State boundaries were an obstacle for event cross-over. Massachusetts and Vermont events, therefore, needed to be duplicated in each state.
- Be clear about whether the goal is quantity (numbers of people) or quality (targeted message) for turn-out at events or request for welcome bags. Low numbers can be demoralizing, even if they are good candidates for conservation /woodland management.
- Generally, we learned a targeted audience is better than a bigger audience when it comes to landowner engagement.
- Implied pressure, however, to get high turn-out at events can lead one back to our “old ways” of doing outreach.

## *Recommendations*

- Landowner outreach should have the overall goal of developing relationships with landowners as woodland management and conservation planning as long-term activities.
- Many contacts and touches are necessary for landowners to take action.

## **7.35 Strategy: Forest Stewardship Program Landowner Network (Stew Club)**

### *Benefits*

- The events solidified landowners’ passion for their land and created stronger advocates for forestry and land conservation.
- From a land trust perspective, we have a better sense of who the advocates for forestry and conservation are in the region and can call on them when needed at public forums and discussions about forestry.

### *Lessons*

- Landowners really enjoyed visiting each other’s land. A lot of learning occurred as people walked together over the land and shared experiences. Most of the landowners were already “on board” with forestry and land conservation. In fact, over half the attendees already had conservation restrictions on their properties.
- The timing of the four events could have been more structured- there was a big gap between the first and second event, and the second through fourth event all happened relatively close to each other. A better structure would be an event every 3-4 months.

### *Recommendations*

- Organize a follow-up with attendees to help them access new programs and opportunities for land conservation and land management.
- Continue organizing Stew Club events into the future.
- Expand invitations to include landowners who are not yet enrolled in the forest stewardship program – in this way, landowner’s already “on board” with forest stewardship can engage those that are not yet there and encourage enrollment and further land management on their land as well as land conservation.
- We could also use the private foresters in the area to help recruit more attendees to the program.

We already have four landowners ready to host the next event, from Gardner, Wendell and Petersham, and we will likely approach DCR Service Forestry and the Working Forest Initiative to see if there is a small amount of funding available (\$100-\$200 per event) to support these meetings.

### **7.36 Strategy: Landowner Neighborhood Gatherings**

#### **Benefits**

- They are a great way for land trusts to meet unengaged landowners in an important focus area.
- They generate a very high show-up rate for the number of landowners targeted – between 20% and 50%.

#### **Lessons**

- Having a well-respected and well-liked host who is pursuing land conservation is the most difficult aspect of these events, as well as having a concrete program or initiative the landowners who attend can join – in these cases it was joining up with a Landscape Partnership Grant effort or a Conservation Land Tax Credit program

#### **Recommendations**

- Conduct more of these outreach events in our region.

### **7.37 Strategy: Enhancing Recreational Values on your Land Tour, or “Land Tour”**

#### **Benefits**

- There is a bridge to be made between simple permaculture activities and woodland retreat owners, and we got close to building it in this workshop.

#### **Lessons**

- Permaculture appears to be a good topic and activity to engage with younger landowners. The word “permaculture” is probably too “out there” for the average 50 to 60 year old woodland retreat landowner. By using different language, however, those older woodland retreaters (who have land with more acres than the landowners that attended our workshop) might attend and learn some great and easy activities they can do with their families to create wildlife habitat, create perennial gardens to supply food, etc.

#### **Recommendations**

- Next time we would probably advertise the workshop without mentioning permaculture.

### **7.38 Strategy: Woodland Ambassador Training and Landowner Outreach**

#### **Benefits**

- TELE approach and messaging concepts were delivered to a wide variety of partners in the field.
- Trained and inspired 31 Woodland Ambassadors, who reached 305 landowners, the majority of whom are Woodland Retreat Landowners.

- The landowner information collected through the surveys can and will be used to target next steps towards forest management and conservation.
- The landowner databases and maps developed through this project are very important for future outreach efforts to engage additional landowners in the focus areas.
- Multiple organizations were able to partner together for the first time because of this project. They now support each other's projects and grant applications. Larger-scale joint projects can now be considered that would not have been possible without the interaction fostered through this pilot.

### *Lessons*

- As more partners are added to the mix, more time is needed to coalesce and plan a project of this magnitude.
- We were overly-ambitious from the start; no one at the table was able to provide a reality check about this Woodland Ambassador Program that could have tempered group expectations.
- The project was also dependent on buy-in from very busy people who were not able to commit to hosting 2-4 events. Even simple Woodland Ambassador events required an incredible amount of time, energy, and commitment from everyone involved. Partner teams (i.e. husband & wife) of Woodland Ambassadors worked well.
- \$250 was not enough for large mailings, advertising and food combined.
- Advertising represented the highest costs per event. Some Woodland Ambassadors picked up the cost of refreshments themselves.
- Collecting completed surveys is an art. Trite as this may sound, we could not get people to fill out the back of double-sided surveys. In the end, we used a one-sided, 8x14 paper and eliminated some questions in order to make it fit on one page.
- The Woodland Ambassadors knew best how to reach the intended audience. Some were very successful in not sending formal invitations but instead relying on direct communications and "flyering."
- A combination of outreach methods (direct mail, list serves, flyering, direct communication and press releases) produced the best results in the MassConn Central and Northern Connections Focus Areas. Website and social media did not seem to be significant factors in attracting attendees.
- The woods walks and informal events were generally well-received by attendees.
- Having the Woodland Ambassador lead the walk/event, and be an expert but an approachable woodland owner just like one of the attendees was well-received.
- The Woodland Ambassador understands and is involved in the local community and has built trust and credibility. Combining this model with "planting" experts in the crowd at the events worked well. The role of the expert was to be available for further detailed information about taking next steps if the attendees had questions.
- Small, super-targeted follow-up events also worked well and helped those landowners who were ready to take the next step. MassConn hosted two follow up events, one with an attorney and one about how to choose a forester. They were small targeted events; attendees who expressed a high interest in taking action on their survey forms from the first event were called personally and invited to the follow-up events.

### *Recommendations*

- Continue to apply TELE principles for communicating with Woodland Retreat landowners. Arrange for additional training in targeted marketing to create better outreach materials.
- Obtain funding for a dedicated outreach coordinator to work with Woodland Ambassadors in the SNEHF.

- Build upon the momentum generated by the pilot project and continue to work with Woodland Ambassadors that have already been recruited in each of the Focus Areas.
- Ask each Woodland Ambassador to host one event, then to be responsible for following up with their visitors to find out if they had taken any steps because of the event. Host a second, highly targeted event if attendees seem willing to take that next step.
- Using the lessons learned, expand the program over time and geography to reach new Focus Areas within the SNEHF.
- Continue developing the partnership between SNEHF pilot project member organizations.

## 8. WHAT DO THE RESULTS POINT TO? WHAT ARE THE BEST STRATEGIES FOR ENGAGING FAMILY FOREST OWNERS IN CONVERSATIONS AND ACTIVITIES THAT LEAD TO THE STEWARDSHIP AND CONSERVATION OF THEIR LAND?

Before answering the question, what are the best strategies for engaging landowners, it's important to step back and consider what needs to be in place for this work to move forward and achieve the long-term outcomes the participants all desire. We all know that no matter how promising a strategy is, it takes time to move previously unengaged landowners towards their first forest management plan, their first harvest, or their first conservation easement. What can help shorten that time span and leverage more from it? What needs to be in place and who is the best placed on the landscape to do this work over time in four large, interstate landscapes? The answers to these questions lay in the approach that the participants in the NEFA Regional Pilot Demonstration Project (NEFA Project) pursued: they collaborated in ongoing partnerships to achieve their shared objectives.

### 8.1 New Approaches to Engaging Landowners in Large Interstate Landscapes

Every individual, organization, and agency that participated fully in the process experienced a shift in how they think about, plan, implement, and evaluate programs and activities focused on engaging landowners. Much of this shift is due to the fact that the participants from state-bound organizations and agencies collaborated (learning and working together) in inter-state regional conservation partnerships (RCPs). And, these RCPs also collaborated (learning and working together) over three years to mold their efforts to achieve the greatest outcomes possible. Here are ways in which the NEFA Project participants broke new ground as they sought to learn how best to engage unengaged landowners in the stewardship and conservation of large landscapes:

- **The NEFA Project participants established three new cross-boundary public-private regional conservation partnerships (RCPs) between conservation land trusts and other conservation organizations and State, Extension, and private consulting foresters.** Each RCP is comprised of state foresters working shoulder to shoulder with staff of land conservation trusts. In addition, many of the activities train and engage both state and private consulting foresters in programs that include estate planning, silviculture for the birds, Woods Forums, etc. The final two innovations listed below are dependent on the presence of the RCP.
- **The NEFA Project's Evaluation Protocol has simple, but effective tools that enabled all partners to track and evaluate landowner participation and engagement, in the same way, across multiple jurisdictions and for a diverse set of activities.** This same protocol has been adopted from the beginning by participating organizations in the Hudson to Housatonic Conservation Initiative.



- **The NEFA Project participants developed a new method for identifying, training, and working side-by-side with peer landowner leaders called, “Woodland Ambassadors.”** Several RCPs have found extraordinary results from working closely with these peer leaders in reaching out to previously unengaged family forest owners.
- **The NEFA Project participants co-created a nested approach to collaborative learning comprised of peer landowner networks, conservation and professional networks within each RCP, and a network of RCPs in a community of learning that comprises 38 RCPs in all.** All of these networks are made possible through the engagement and partnerships of individuals working within public and private institutions that are at a density common to areas throughout southern, central and large portions of northern New England. It is through networking peer landowners, foresters and conservationists that share a conservation vision across town and state boundaries, and the RCPs themselves that all of the participating RCPs, as well as NEFA and the US Forest Service, learn how to most efficiently target, evaluate, learn from, and improve their messages and approaches for engaging individual and family forest owners.
- **The NEFA Project participants co-developed a new step-by-step approach to engaging landowners at the landscape-scale.** They did so through public-private partnership. This approach is applicable to areas beyond New England. It is applicable to any effort that targets outreach efforts to landowners in focus areas known to be of high local and regional significance. These areas often contain the gaps between large, ecologically and economically important forest blocks. Public and private RCP partners are now working across state lines for the first time ensuring the conservation of longer-term and larger landscape conservation values. Each RCP includes state foresters and land conservation trusts with long standing professional staff who have great interest in stewarding landowners on the path from awareness to active forest management and then over time, to conservation (see the 16-step approach on pages 18 and 19).

## 8.2 The Best Strategies for (Attracting and) Engaging Family Forest Owners in Conversations and Activities that lead to the Stewardship and the Conservation of their Land

When we first began this project, we were interested in understanding which strategies and sequences of activities led to the best outcomes: numbers of people engaged in new stewardship and conservation activities. We also wanted to see if the TELE approach would attract more of the kinds of landowners we wanted showing up at events. For many participants and partnerships, these were previously unengaged Woodland Retreat owners. Based on the numbers, our approach engaging landowners in large landscape stewardship and conservation is off to a very good start.

Between January 2013 and June 2014, the four RCPs communicated directly with over 18,000 family forest owners, most of them Woodland Retreat Owners. They invited these landowners, using messages they derived from the training they received from the SFFI to Woods Forums, Woods Walks, Estate Planning Workshops, Bird Workshops, and other landowner events. Over 1,000 answered the call (12%). Those that attended their first event heard from their peers about why they enjoyed and cared for their land. They learned they had options. RCP members and peer leaders followed-up and encouraged those most interested to take the next step: speak with a forester, an attorney, a land trust professional, or go to bird workshop. Over 200 landowners did just that (28%). By making these next steps easy, RCPs moved these landowners further down the path towards accomplishing their own objectives

- 41 landowners met with a consulting or an extension forester, 10 have begun management plans. 52 Bird Habitat Assessments were completed on 7,358 acres.
- 48 landowners met with an attorney to talk about their estates and their conservation options, 20 met with a land trust, and 16 new land protection projects are in process, representing 1,935 acres.

Using the 16-step approach identified earlier, NEFA Project participants employed and evaluated five strategies, alone and in combination: Woods Forums, Estate Planning Events, Silviculture for the Birds, Woodland Ambassadors, and Other Events. Participants also learned what worked to attract landowners to their first event.

So what did we learn? We are unable to say which sequence of activities work best due to the diversity of approaches and the limited number of times people used the same exact sequence. However, we can show, based on an analysis of outcomes tracked by participants, how each strategy fared in comparison with the others (see Table 2). Participants also have lessons to share about each strategy (p 38-45).

Based on Form B figures in Table 2, we can surmise that **Woods Forums** can be an effective strategy as a landowner's introduction to conservation and stewardship. Looking back at what participants did with this strategy, most designed a postcard, which was then sent to all of the landowners in their focus area having the appropriate attributes (e.g. minimum ownership acreage). Although the response rate was low (4% of landowners receiving a postcard attended), 27 percent of the attendees ended up taking next steps towards conservation or stewardship. **Estate planning events** saw similar results as Woods Forums overall but were not as popular as the Woods Forum. Both of these events benefited from having relevant follow-up opportunities for attendees who were managed by the partners.

This one factor was missing from both the **Woodland Ambassador Program** and **Silviculture for the Birds**. Evidence suggests that the WA program can be effective in harnessing the charisma of strong peer leaders who then go on to serve as recruiters and extension agents for dozens of landowners. Silviculture for the Birds is very promising both as a hook to engage unengaged landowners, and a means for bringing forestry and foresters into the mainstream. With each of these programs, much energy was spent on the first stages of each of these two programs: have WAs host Woods Forums and Woods Walks and train foresters and inform landowners of this new way of managing woodlands while lining up and completing bird habitat assessments. In each of these cases, there lacked the obvious next step for the organizer (i.e. the WA team leader and the Audubon organization). What is needed in both cases, as well as with each and every other landowner engagement strategy, is the landowner shepherd. The shepherd is the organization that will oversee the relationship between the landowner with her/his land towards their continued movement towards stewardship and conservation. Without that role, no strategy would succeed in achieving its full potential.

Two other strategies are worth highlighting: **Landowner Neighborhood Gatherings** and **Forest Stewardship Program Landowner Network (Stew Club)**. These are low cost, small-group gatherings of landowners with WAs involved from the beginning and with a common purpose of generating interest in the potential landscape-scale land conservation project and in forest management, respectively. Both strategies provided for a relatively high response rate (37% and 14%) and a very high percentage of attendees taking next steps (55% and 40%). What accounts for this success? We have learned that the best strategies for reaching and engaging landowners are not of a particular kind, like Estate Planning over Woods Forums, but in how they are advertised, organized, run, and most important--the follow-through. Based on the outcomes reported by the partnership groups (see Table 2), a "best" strategy is one having the following attributes:

- A collaboration of organizations and agencies, like an RCP, engage their partners each of whom contribute to and coordinate landowner outreach and engagement in their shared focus area (s).
- Involvement and leadership of land trust professionals for conservation-related outcomes and follow-through, and an extension forester or another natural resource professional for stewardship-related outcomes.
- Woodland Ambassadors or Peer Landowner Leaders cultivated, trained, and motivated to assist in all aspects of outreach and engagement, but not serving as event leaders, organizers, producers, or managing follow-through with attendees. Have conservation staff do this work.
- A well-thought through outreach strategy that includes direct mail within a month of the event and partner staff and peer leaders calling prospective attendees before events.
- Events that have tangible follow-up activities and opportunities like one-on-one meetings with foresters, attorneys, land trusts, etc., or other workshops.
- Landowner follow-up within one to two months of these one-on-one next steps (e.g. meetings with an attorney) by the partners most invested in management and or land protection outcomes.
- Plans to capture momentum by continuing to communicate and engage landowners in the partners' focus

areas.

- Connect landowners to various professionals that allow for new opportunities and pathways to conservation and stewardship like Audubon groups and their Silviculture for Birds program.
- Ample time to plan for those activities like Silviculture for the Birds that require larger windows of time for inviting landowners, doing fieldwork, and for following up with next steps linking assessments to management plans, to active treatment, and to future Bird Habitat Walkovers.

We are faced with similar constraints in trying to answer, what worked best to attract landowners to their first event, whatever the strategy. Similarly, we are unable to point definitively to the best message, the best channel, the best postcard design, etc., for capturing the unengaged landowner's attention and motivating them to attend the planned event. We can offer elements to consider when planning and implementing your landowner communication effort, when part of the RCP approach listed on pages 18 and 19:

- **Determine your desired outcomes.** Do you want 5 landowners ready to invite a forester onto their land? Or ten new conservation easement projects?
- **Get to know your conservation focus area and the culture of the communities involved.** In other words, are the forest owners farmers or residents of a bedroom community? Is the region dominated by large ownerships or subdivisions, absentee landowners, lands in current use, vacation homes, and or subdivisions?
- **Know which landowner category you want in attendance.** Which TELE category? Often, once you've decided to focus on Woodland Retreat owners, for example, you'll need to imagine that kind of landowner in the community/focus area you're targeting. There may be other factors to consider including parcel size, as well as socio-economic factors.
- **Reach out and invite Woodland Ambassadors (WA), or otherwise named peer landowners, to help you target your message, pick your channel and your strategy.** The WA(s) will be from the focus area, be known by and know other landowners, have either managed their land, conserved it, or both, be a member of your target audience or not, and be willing to serve as a living example/proof of what other landowners could become in the future: someone who has achieved what they wanted to do with their land.
- **Depend on one message, but use multiple channels.** Assuming you have received the full complement of TELE training with additional mentoring, and you have a well-crafted message like "You love your land, what's its future," use a series of touches (e.g. multiple postcard mailings, phone calls from WAs, flyers, newspaper ads, etc.) to have your message reach landowners in your conservation focus area. Know that newspaper articles could bring people from outside your target area.
- **Use good design in crafting your media** (e.g. postcards). Use your message but also employ common sense. Use words that work: clear, simple, direct. Use images that attract people. Don't put so many words that people lose interest. Don't be afraid to allow graphics to tell most of your stories. Have WAs hand write messages on postcards and flyers.
- **Choose to highlight the fact that you'll serve pie and coffee over explaining who's in your partnership.** Landowners care more about pie and coffee (or cocktails) than the fact that you've formed a coalition. They will come to meet other local people and they will be interested while in the meeting to learn how the focus area in which they live is part of a bigger landscape, but that won't get them in the door like free pie will.
- **Have follow-up activities to offer the attendees of these first events.** Woods Forums and Woods Walks are good first-time events. These can be followed by topic-oriented programming that can lead the landowner towards considering and choosing conservation and stewardship options.

### 8.3 Recommendations

The following draft recommendations will be revised upon review by NEFA Project participants. For now, they represent the opinion and perspectives of Highstead and staff. These recommendations are split by their intended audience: RCP members, State Foresters, and the US Forest Service.

### 8.31 Recommendations for the 3 Emerging RCPs and Q2C

- Re-convene, decide whether to continue your partnership and if so, on whether there are other organizations you could include as partners. In each landscape, there are considerable opportunities to strengthen your partnership through the engagement of other organizations and agencies.
- Join the RCP Network and take advantage of the resources and knowledge of its member RCPs. Take full advantage of the RCP Handbook and services offered periodically.
- In the near future, develop a strategic conservation plan with focus areas based on best available science and data sets.
- Continue to engage the state foresters in your outreach and engagement work.
- Revisit each of your strategies and consider where improvements are needed. Focus on those that will generate the most tangible and desirable outcomes in the short-term. Use this report as a reference for how to do that.
- Reach out to the other RCPs including Q2C to explore how you might collaborate on future grants.
- Consider the following sequences of events as possible templates where the land trust owns the follow-up in each case, bringing in the state forester or extension forester as needed:
  - Woodland Ambassador (WA) recruitment, Woods Forum, Sit-down meetings with land trust staff and or forester, the land trust leads follow-up
  - WA recruitment, Woods Forum, Estate planning event, meet with the land trust and attorney
  - WA recruitment, Neighborhood Landowner Meeting 1, 2, 3, meetings with land trust and attorney to discuss conservation opportunities.
  - WA recruitment and Train foresters in Silviculture for the Birds, Pioneer Bird Habitat Assessment on WAs land, Bird Workshop with Tours of Assessed Lands by WA as landowner, Bird Habitat Assessments, One-on-one meetings between landowners and foresters/NRCS state conservationists, Conservation and or Management Plan completed and Implemented, continued follow-up by land trust staff and state forester, land entered into current use, and or conserved with an easement.

### 8.32 Recommendations for the North East *State Foresters Association* and other State Foresters and their Agencies

- Support the continued involvement of your state foresters in the work of these four RCPs.
- Fund the development of peer-to-peer education and actively engage networks of family forest owners throughout your state.
- Encourage the RCPs to apply for Landscape Scale Restoration grants themselves or in partnership with other RCPs.
- Find ways of sharing the lessons and results of this initiative throughout the Northeast region, and beyond.
- Continue to look for ways to partner with the RCPs in your states to achieve shared objectives. Consider attending the RCP Network Gathering each fall to stay engaged with this important community.
- Work with RCPs as a means for engaging with other state and federal agencies to access resources or to have a positive impact in high priority areas.

### 8.33 Recommendations for the US Forest Service Northeastern Area State and Private Forestry

- Explore ways of working with RCPs and the RCP Network to advance the stewardship and conservation of large forested landscapes in high priority resource areas. Each of the 40+ RCPs across New England and Eastern New York is striving to increase the pace and scale of collaborative stewardship and conservation in suburban, exurban, pastoral, and more forested natural landscapes. At some point in their development, RCPs typically develop a strategic conservation vision and geographic information systems (GIS) map showing areas where land protection and stewardship are to be prioritized. RCP partners then collaborate to achieve objectives associated with these priority areas. GIS data layers including prime forest soils, current use parcels, areas threatened by development or pests and disease, areas of high forest productivity or “wood baskets,” and distressed watersheds are examples of the types of spatial information that RCPs

would use if they had access to, as well as accurate information about their application. The US Forest Service might be able to provide valuable input to RCPs' prioritizations by delivering accessible science and information similar to what the North Atlantic Landscape Conservation Cooperative (NALCC) is doing with RCPs, or do so in conjunction with that program.

RCPs may reach out to state and federal agencies to see if they share an interest in a large landscape. The US Forest Service Northeastern Area State and Private Forestry and the USFS could work with the RCP Network to identify targeted services for RCPs within New England and Eastern New York. For example, the USFS might be able to provide experts and or educational programming and training in watershed protection, climate change adaptation, forest-based economic development, etc. The RCP Network would work closely with the US Forest Service to develop trainings to help spread knowledge about forest resource management issues and effective responses. Additionally, the USFS may have the ability to assist RCPs and the RCP Network in effectively partnering with the forest products industry. Perhaps in the future, industry and the USFS might serve as a member of the RCP Network and or a specific RCP.

- Continue to support the development of landscape-scale approaches to conservation and stewardship challenges that take advantage of the immense capacities already in existence in the form of peer landowners, landowner networks, land trusts, and regional conservation partnerships (RCPs) that together cover over 55% of the forests of New England.

RCP Network members understand the immense resource in New England's largely privately-owned forests. They recognize that there will be pressures to convert forest land to other uses and that one solution is to help landowners protect their land from development and ensure they receive the services of professional foresters. RCPs recognize that in order to inform more landowners of their options, more boots on the ground are needed for educating and informing. In order to do that, especially in an era when states' resources for forest education are less than they once were, activating networks of passionate peer landowner leaders is a key strategy. And, as this report shows, these networks of peer landowners must be cultivated and directed by those with the greatest interest in the ultimate outcome: more acres under long-term management and more acres under permanent conservation easements. In order to realize this outcome, the US Forest Service and states need to increase funding for peer-landowner leader training like Coverts and Keystone Programs, while Congress needs to increase funding for the Forest Legacy Program for New England and New York.



