

## PARTNERSHIP REPORT

1. **PARTNERSHIP NAME** – Taconics Group
  
2. **LANDSCAPE:** The Taconic Mountains run along the eastern border of New York State and adjacent New England from northwest Connecticut to western Massachusetts and north to central western Vermont. Taconic is a Native American name meaning “in the trees”.
  - a. **FOREST THREATS:** There are different forest threats in each one of the three focus areas within the Taconics Group region. The primary threat to forests in the central area of the Taconics region is fragmentation as forest lands are sold for residential development. This is due in part to growth in the Albany area, just fifteen miles from the focus area and high property taxes which often compels landowners to sell property to reduce their tax burden. In the northern focus area, the primary threat in the New York side is excessive logging that has stripped many of the forests of mature growth trees. Forest lands have been poorly managed in order to maximize timber harvests in the short term. On the Vermont side of the northern target area, the primary threat is fragmentation due to the high number of second home owners moving into the area. Fragmentation due to a large increase in second home owners is also the primary threat in the southern focus area of the Taconics that is within a two hour drive from New York City. All areas will be affected by the massive intergenerational transfer of land that is anticipated in the coming years as 69% of forest lands in New York are owned by landowners 55 and older.
  
  - b. **CONSERVATION FOCUS AREAS:** The conservation focus areas in the central Taconics region were in the towns of Berlin, Stephentown, New Lebanon and Canaan, New York. The focus areas in the southern part of the Taconics region were Copake and Ancram, New York, Salisbury, CT., and Mt. Washington, Egremont and Sheffield, Mass. The northern focus area included the towns of White Creek, Jackson and Salem, New York and the towns of Arlington, Rupert, Sandgate, Dorset and Manchester, Vermont.
  
  - c. **MAP OF LANDSCAPE:** See attached mapping developed under the auspices of this grant.
  - d. **MAP OF FOCUS AREA:** See attached mapping
  
3. **PARTNERSHIP**
  - a. **MEMBERS AND KEY ROLES:** The Taconics region had three focus areas. The focus area in the northern Taconics included towns in Washington County, New York and southern Vermont. The Agricultural Stewardship Association (ASA) of New York State partnered with the Vermont Land Trust (VLT) to do outreach and present two Estate Planning Workshops to landowners in the focus area. The central area in the Taconics included four towns in two counties and the Rensselaer Plateau Alliance (RPA) partnered with the Columbia Land Conservancy (CLC) to present two Woods Forums and two Estate Planning Workshops and a seminar on Conservation Estate Planning for local attorneys. Events in the southern focus area, which encompassed seven towns on three states, were presented by the Housatonic Valley Association (HVA) and the Columbia Land Conservancy (CLC).

- i. **COORDINATORS:**— NUMBERS OF MEETINGS (ATTACH AGENDAS) Marybeth Pettit, on behalf of the Rensselaer Plateau Alliance, co-coordinated meetings and information for the Taconics Group. Four meetings were held; July 12, 2012, March 11, 2013, October 7, 2013 and January 28, 2014.
  - ii. **FOCUS AREA LEADERS:** Kate McQuerry, on behalf of ASA, and Donald Campbell of VLT were leaders in the northern focus area. Marybeth Pettit, on behalf of RPA, and Nate Davis of CLC, were the leaders in the central focus area and Tim Abbot of HVA and Nate Davis of CLC led efforts in the southern focus area.
  - iii. **OTHER VENDORS AND ROLES:**
  - iv. **OTHER PARTNERS:** The Audubon Society and Trout Unlimited worked with local NGOs in the southern focus area. State Foresters from the New York Department of Environmental Conservation attended Woods Forums in the central focus area as did representatives of the New York State Forest Owners Association.
4. **FOCUS AREA (1-TOTAL NUMBER OF FOCUS AREAS): THE TACONICS REGION HAS THREE FOCUS AREAS**
- a. **STRATEGY # 1 (1- TOTAL NUMBER OF STRATEGIES): NAME: Central Focus Area: Woods Forum #1- 7/16/13**
  - b. **LANDOWNER GROUP TARGETED:** Woodland Retreat Owners
  - c. **DESIRED OUTCOMES FROM STRATEGY:** Discuss conservation and forestry management with local forest landowners and provide contacts for additional information.
  - d. **MESSAGES USED (AND HOW THIS TIES TO YOUR TARGET AUDIENCE):** The invitation was developed to specifically appeal to Woodland Retreat Owners using TELE language that was reviewed and approved by Mary Tyrell of Yale. Attendees were invited to learn how to “enhance the health of your woods for the enjoyment of your family and introduce ways to promote woodland habitats for wildlife” an approach designed to appeal to protecting the primary interests of Woodland Retreat owners. Love of the land was a shared value with both targeted groups of landowners.

**MATERIALS AND CHANNELS USED (DISCUSS WHICH CHANNELS AND MATERIALS WERE USED AND WHY, REFERRING TO THE TELE WORKSHOP):** Over 500 invitations mailed, flyers posted in libraries, post offices, town halls and general stores of the local target area in addition to announcements in local papers. It was felt that an invitation featuring a happy couple strolling in the woods and using TELE language, would be an effective outreach tool. This same image and language was used on flyers posted throughout the towns in the focus areas. Personal phone calls reminding invitees of the event were found to be the most effective way of encouraging landowner attendance.

- e. **TIMELINE AND BUDGET:** Invitations were mailed three weeks prior to the Woods Forum and personal phone calls were made in the two weeks before the event. The mailed invitations were for the Woods Forum as well as an Estate Planning Workshop held several weeks later as part of a summer series of events. The budget for these invitations, including postage, envelopes and printing was \$574 plus an additional \$195 for food and venue costs for a total of \$769.
- f. **SUMMARY OF WHAT HAPPENED:** Thirty local landowners attended along with the participating NGOs and foresters. A brief power point presentation was made describing New York’s forest pattern of ownership and then focused on the two key decision points facing landowners; deciding to sell land and/or harvest timber. Attendees were encouraged to use foresters to assist in managing woodlands and to solicit fair bids for timber. Various best management practices were discussed as was the use of conservation easements as an alternative to the sale of land. Landowners had a roundtable discussion regarding tax programs in NY, easements. Forestry practices, use of foresters and invasive species among other topics. Eight attendees signed up for a free visit from a participating consulting forester.
- g. **CHALLENGES AND SOLUTIONS/ ADAPTATIONS:** There are relatively few conservation groups in the Rensselaer County part of the focus area and this event helped to raise RPA’s profile and create goodwill in the community.

The initial mailed invitation had a poor response, but personal follow up phone calls were effective in encouraging increased participation.

- h. ACTUAL OUTCOMES:** Eight landowners had site visits with a professional forester. Two of the participants in the Woods Forum from the focus area completed significant donations to the Rensselaer Land Trust. One attendee donated a conservation easement on 127 acres in Stephentown, New York and another attendee donated eight acres in East Nassau, New York for access to a waterfront preserve. These donations were ongoing, but hopefully these benefactors were encouraged by the additional conservation efforts in the region.
- i. BY THE NUMBERS (SEE FORM B) - WHAT WERE THEY AND WHAT DO THEY SAY:** Invitations were sent to 589 forest landowners in the target area. Due to obsolete data on tax rolls, 56 invitations were returned as undeliverable. Personal phone calls were made to 171 landowners. Thirty people attended and eight signed up for a forester site visit. In follow up phone calls, it was determined that no new management plans were in place, but that two of the attendees had donated 127 acres in conservation easement and eight acres as a gift to the Rensselaer Land Trust. These donors had been in discussion with the land trust, but were hopefully reassured by the continuing depth of commitment to conservation in the region.
- ii. MEDIA AND PRODUCTS (POST CARDS, FLYERS, LETTERS USED):** Invitations using the TELE language designed to appeal to Woodland Retreat Owners were sent to 533 forest landowners. This invitation was for both the July Woods Forum and the August Estate Planning Workshop, presented as a summer series for forest owners. Twenty five flyers were hung in local libraries, post offices, town halls and general stores in the four town region, in addition to notices placed in two local papers. Copies of the book “More than a Woodlot” were offered to all attendees in addition to contact information for local NGOs, state and consulting foresters and a master forester.
- iii. EVENT PRESS COVERAGE:** Notices announcing the meeting were placed in two local papers.
- i. LESSONS:** Personal calls were the most effective way to get people to attend. The people who did attend were eager for information and fellowship with other land owners and seemed to want to remain in touch to receive additional information. Offering a free forester site visit was a valuable take away. No new management plans have been produced as a result of this grant. This is due in part to the negative perception that the majority of forest owners seem to have towards the 480 a New York State tax reduction program. This program seems widely viewed as imposing complicated restrictions over a ten year period with harsh penalties for non-compliance. As one landowner said in a follow up call “the 480 a program isn’t worth it and I don’t want the state in my backyard telling me what to do”.
- j. BENEFITS:** A great deal of goodwill was generated by these events that will benefit the involved NGOs, even if there is little or no donation activity in the short term. Information regarding conservation easements, forestry practices and a list of local contacts has been distributed to the wider public. A group of local landowners who want to be involved has been identified and should be cultivated.
- k. RECOMMENDATIONS:** The Rensselaer Plateau Alliance is the first conservation NGO to focus exclusively on these lands within Rensselaer County and the Woods Forum and other events of the past two years has helped to establish them as a viable entity in the region. This event helped them to reach local landowners who want to be involved with local conservation groups and these contacts should continue to be cultivated. These landowners should be included in mailings/ outreach for potluck suppers, woods walks, lecture, demonstrations, etc. in order to continue to develop the sense of community that they seemed eager to embrace. Columbia Land Conservancy to the south is a more established conservation organization and should continue their outreach efforts. Once trust is established with these participants, they become strong supporters of the organizations. A review of the New York State tax program 480a seems warranted given the numerous complaints about the program and to make it more user friendly. A similar law in Massachusetts seems to be more generally accepted and widely used, and is perceived as less onerous.

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5. **FOCUS AREA (1-TOTAL NUMBER OF FOCUS AREAS)** The Taconics region has three focus areas.
- a. **STRATEGY #2 (1- TOTAL NUMBER OF STRATEGIES): NAME: Central Focus Area Estate Planning Workshop #1 8/20/13**
  - b. **LANDOWNER GROUP TARGETED:** Woodland Retreat Landowners
  - c. **DESIRED OUTCOMES FROM STRATEGY:** To have landowners consider land conservation when developing an estate plan.
  - d. **MESSAGES USED (AND HOW THIS TIES TO YOUR TARGET AUDIENCE):** Woodland Retreat landowner types were invited to “ Come get an overview of estate planning from an experienced attorney...this workshop will focus on maintaining family ties to the land from generation to generation, building awareness of key issues facing family woodland owners and motivating families to address this challenge.” This TELE language was designed to recognize the issues involved in the intergenerational transfer of land using phrases reviewed by Mary Tyrell of Yale as the most effective to reach the target group.
  - e. **MATERIALS AND CHANNELS USED (DISCUSS WHICH CHANNELS AND MATERIALS WERE USED AND WHY, REFERRING TO THE TELE WORKSHOP):** Invitations to this event were mailed to 533 local landowners. And 152 personal calls were made to encourage attendance. This same mailer included an invitation to the Woods Forum in the previous month; the two were presented a series of informational meetings.
  - f. **TIMELINE AND BUDGET:** The invitations were mailed out 6 weeks prior to the event and personal phone calls were made in the two weeks leading to the event. The budget for these invitations, including postage, envelopes and printing was \$574 plus an additional \$195 for food and venue costs for a total of \$769.
  - g. **SUMMARY OF WHAT HAPPENED:** Fourteen people attended the Estate Planning Workshop. A brief power point presentation was shown noting the average age of forest landowners in New York and the massive intergenerational transfer of land that will occur in coming decades. Participants were encouraged to begin the delicate discussion of the future of their land within their family and with an estate planning attorney. John Lavelle, a local estate planning attorney, then gave an informative and entertaining presentation about the importance of estate plans as a means of avoiding excessive taxation and elaborated on some of the conservation strategies that can be incorporated into an estate plan.
  - h. **CHALLENGES AND SOLUTIONS/ ADAPTATIONS:** It was more difficult to attract people to an Estate Planning Workshop than a Woods Forum, Holding the Woods Forum first was important as it was a more accessible subject with enthusiastic participation. More than half of the attendees of the Estate Planning Workshop had attended the previous Woods Forum, the success of which helped to create enthusiasm for the subsequent event.
  - i. **ACTUAL OUTCOMES:**
    - i. **BY THE NUMBERS (SEE FORM B) - WHAT WERE THEY AND WHAT DO THEY SAY:** Invitations were mailed to 533 local landowners and 152 personal calls were made to encourage attendance. 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.
    - ii. **MEDIA AND PRODUCTS (POST CARDS, FLYERS, LETTERS USED):** Invitations using the TELE language targeting Woodland Retreat owners were sent and similar language was used on 25 flyers placed within public areas in the four towns.
    - iii. **EVENT PRESS COVERAGE** Two notices were placed in local papers.
  - j. **LESSONS:** It is harder to interest landowners in the topic of estate planning as it is seen as complex and difficult. Schedule Estate Planning Workshops after the Woods Forums to encourage attendance. Almost all attendees

were older people who already had an estate plan and attorneys who they had worked with. They were interested in additional information, but did not need an appointment with the presenting attorney.

- k. **BENEFITS:** More goodwill was generated. The free information was appreciated as was the pie and coffee and the opportunity to connect with other local landowners.
- l. **RECOMMENDATIONS:** 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. One on one attorney consultations could also be offered at a Woods Forum or as a function of a local conservation NGO in order to disseminate the information among a wider demographic.

6. **FOCUS AREA (1-TOTAL NUMBER OF FOCUS AREAS):** The Taconics region has three focus areas.

- a. **STRATEGY # (1- TOTAL NUMBER OF STRATEGIES): NAME: Woods Forum #2 – January 5, 2014**
- b. **LANDOWNER GROUP TARGETED:** Working the Land landowners were targeted for this event.
- c. **DESIRED OUTCOMES FROM STRATEGY:** Information was presented to encourage landowners to consider conservation easements or land donations and to use a consulting forester when timbering and/or to develop a management plan.
- d. **MESSAGES USED (AND HOW THIS TIES TO YOUR TARGET AUDIENCE):** TELE language designed to appeal to Working the Land type landowners invited them to “ join fellow landowners and forestry professionals for a discussion on how to maintain the value of your woods for timber harvesting, recreation, wildlife and future generation”. This approach was geared to touch upon the land as an economic resource as well as for hunting and family legacy.
- e. **MATERIALS AND CHANNELS USED (DISCUSS WHICH CHANNELS AND MATERIALS WERE USED AND WHY, REFERRING TO THE TELE WORKSHOP):** Invitations using the TELE language and illustrated by a family in the Woods were mailed to 533 landowners in the focus area. Flyers were posted in the libraries, town halls, general stores in addition to the local gun club.
- f. **TIMELINE AND BUDGET:** : Invitations were mailed three weeks prior to the Woods Forum and personal phone calls were made in the two weeks before the event. The mailed invitations were for the Woods Forum as well as an Estate Planning Workshop held several weeks later as part of a winter series of events. The budget for these invitations, including postage, envelopes and printing was \$574 plus an additional \$195 for food and venue costs for a total of \$769.
- g. **SUMMARY OF WHAT HAPPENED:** A brief power point presentation was made that touched upon the two key decision points, whether or not to sell timber and deciding the future of their land, when landowners are encouraged to seek professional assistance from foresters and land conservation specialists. The round table discussion that followed elaborated on these themes. A New York State forester explained the benefits of the 480 tax program. There was strong interest in reducing tax bills, but several landowners felt that the 480 tax program was too demanding for such a small benefit. There was interest in developing management plans to generate revenue to support family farms. The consulting forester answered several questions about the services he provides and walked attendees through the bid process for timber harvesting. After the conclusion of the meeting, people stayed for an additional hour to enjoy refreshments and visiting.
- h. **CHALLENGES AND SOLUTIONS/ ADAPTATIONS:** Attracting Working the Land landowners to a Woods Forum proved difficult. Approximately 30% of the attendees fit t his profile; the remaining attendees were Woodland Retreat Owners. Several proposed Woodland Ambassadors declined to call neighbors to invite them to the event.
- i. **ACTUAL OUTCOMES:** Six attendees met with a local consulting forester for a site visit.
  - i. **BY THE NUMBERS (SEE FORM B) - WHAT WERE THEY AND WHAT DO THEY SAY:** Four of the fourteen attendees were Working the Land landowners. Nine of the fourteen, representing six families, had

successful site visits from the consulting forester, and although no new management plans have been developed, several landowners indicated an interest in developing one when contacted in a follow up phone call.

- ii. **MEDIA AND PRODUCTS (POST CARDS, FLYERS, LETTERS USED):** Invitations were sent to 533 landowners in the target area and 110 personal calls were made prior to the event. The same TELE language used in the invitation was also used in the flyer posted throughout the four towns. Over twenty five flyers were placed in public locations in the four towns, and in the local gun club. Flyers for the event were also e-mailed to the local snow mobile club and the fish and game club.
- iii. **EVENT PRESS COVERAGE :** Notices were placed in two local papers.
- j. **LESSONS:** It is difficult to attract Working the Land type landowners to these events and there was some distrust of more government intervention, although the New York State forester connected well with the group and made a strong case for a management plan and the 480 tax program.
- k. **BENEFITS:** Once again, participants enjoyed a sense of being part of the forest landowner community and this event, like the others, helped to build goodwill for the local conservation NGOs. Contact information was given out for local and state foresters and conservation NGOs.
- l. **RECOMMENDATIONS:** Consider changing the venue of this meeting to an outside location like a demonstration forest and advertise that free consultations with a professional forester will be available to all attendees. Review New York State 480 tax program to make it more appealing to landowners. If you can find a Working the Land landowner to make calls to encourage attendance that would be helpful. It might be easiest to 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.

7. **FOCUS AREA (1-TOTAL NUMBER OF FOCUS AREAS):** The Taconics region has three focus areas.

- a. **STRATEGY # (1- TOTAL NUMBER OF STRATEGIES): NAME: : Central Focus Area Estate Planning Workshop #2 1/18/14**
- b. **LANDOWNER GROUP TARGETED:** Working the Land
- c. **DESIRED OUTCOMES FROM STRATEGY:** To have landowners consider land conservation when developing an estate plan and to begin the discussion about the future of the land within the family and with an estate planning professional.
- d. **MESSAGES USED (AND HOW THIS TIES TO YOUR TARGET AUDIENCE):** Invitees to the event were invited to " 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.
- e. **MATERIALS AND CHANNELS USED (DISCUSS WHICH CHANNELS AND MATERIALS WERE USED AND WHY, REFERRING TO THE TELE WORKSHOP)** Invitations to the winter series of events, including the earlier Woods Forum, were mailed to 533 local landowners. Flyers were hung in post offices, general stores, libraries and town halls in the four towns in addition to the gun club.
- f. **TIMELINE AND BUDGET:** Invitations were mailed out five weeks before the event and personal phone calls were made in the two weeks prior leading up to the event. The mailed invitations were for the Woods Forum as well as an Estate Planning Workshop held several weeks later as part of a winter series of events. The budget for these invitations, including postage, envelopes and printing was \$574 plus an additional \$195 for food and venue costs for a total of \$769.
- g. **SUMMARY OF WHAT HAPPENED:** Eleven local forest landowners attended the event. Attendees were briefed on the large intergenerational transfer of land that will be happening in the near future and were encouraged to think of conservation strategies when designing their estates. Noting that estate planning is complex, attendees were encouraged to begin the discussion with their families about the future of their land. The presenting

attorney reviewed a four page handout and explained conservation strategies such as easements, life estates, purchase of development rights and bargain sale for landowners to consider. All enjoyed pie and coffee and an opportunity to visit with neighbors.

- h. CHALLENGES AND SOLUTIONS/ ADAPTATIONS:** Once again, attendance was improved by making personal phone calls to local forest landowners. Attendance at this venue in Stephentown, was primarily people from Rensselaer County. It had been previously noted that people seemed unwilling to cross county borders to attend events, therefore one Woods Forum and one Estate Planning Workshop was presented in both Columbia and Rensselaer Counties.
- i. ACTUAL OUTCOMES:**
  - i. BY THE NUMBERS (SEE FORM B) - WHAT WERE THEY AND WHAT DO THEY SAY:** Eleven people attended the Estate Planning Workshop. Six people, representing three families, met with the estate planning attorney for a free consultation and have begun the discussion within their families on the future of their property.
  - ii. MEDIA AND PRODUCTS (POST CARDS, FLYERS, LETTERS USED):** Invitations were mailed to 533 local landowners in the target area using TELE language designed to appeal to the Working the Land property owners. Over twenty five flyers were placed in public locations in the four towns, and in the local gun club. Flyers for the event were also e-mailed to the local snow mobile club and the fish and game club.
  - iii. EVENT PRESS COVERAGE:** Notices were placed in two local papers
- j. LESSONS:** Estate planning is a multi step process that can be intimidating. These meetings were an excellent way to get local forest landowners to begin thinking about the future of their land. While no land has resulted in conservation in the four months since the meetings, attendees were given contacts in local land conservation groups; the Rensselaer Plateau Alliance, the Columbia Land Conservancy and the Rensselaer Land Trust. It is important that these connections between landowners and local NGOs continue to be developed as estate planning and conservation donations are long term efforts.
- k. BENEFITS:** All of the outreach events built goodwill in the community and helped to build trust and credibility in the local conservation organizations. Contact information was distributed among local forest landowners, many of who were new faces to this organization.
- l. RECOMMENDATIONS:** It is vitally important to remain in touch with attendees to all of these events. Develop an e-mail newsletter sent monthly or quarterly, with information about conservation efforts in the target area. Continue to invite them to regularly scheduled events such as potluck suppers, woodland lecture series, forest demonstrations, etc. All attendees seem to enjoy the social aspect of these events and it is important to create a sense of community for as Paul Cantanzaro noted, landowners who know their neighbors are the most likely to consider land conservation.

**8. FOCUS AREA (1-TOTAL NUMBER OF FOCUS AREAS):** The Taconics region has three focus areas.

- a. STRATEGY # (1- TOTAL NUMBER OF STRATEGIES): NAME: : Conservation in Estate Planning Seminar for Attorneys 5/29/14**
- b. GROUP TARGETED:** Estate Planning Attorneys
- c. DESIRED OUTCOMES FROM STRATEGY:** To better educate local attorneys on conservation strategies that may be employed when developing an estate plan for a client and how this can benefit the client and the community.
- d. MESSAGES USED (AND HOW THIS TIES TO YOUR TARGET AUDIENCE):** Local attorneys were invited to learn more about conservation planning and free Continuing Legal Education (CLE) credits were offered to attendees.
- e. MATERIALS AND CHANNELS USED (DISCUSS WHICH CHANNELS AND MATERIALS WERE USED AND WHY, REFERRING TO THE TELE WORKSHOP)** This event was held in conjunction with Albany Law School who sent out two rounds of e-mail invitations to 346 estate planning attorneys. An e-mail invitation to the event was also sent

to 495 local Estate Planning Attorney Association by the presenter, John Lavelle, an estate planning attorney from Albany. In addition, personal phone calls were made to the offices of eight local attorneys.

**f. TIMELINE AND BUDGET:** Invitations were e-mailed three weeks before the event and personal phone calls were made in the two weeks prior leading up to the event. The budget for this legal seminar was \$2,665 for the presenter, venue and refreshments and underwriting the continuing legal education credits for the attendees.

**g. SUMMARY OF WHAT HAPPENED:** Thirteen attorneys from the Albany, New York area attended a three hour seminar on conservation in Estate Planning. Local estate planning attorney, John Lavelle, gave an informative presentation and discussed estate tax reform and land conservation, valuation of conservation easements, New York and federal property tax benefits, estate tax benefits and selling state conservation easement tax credits in detail.

**h. CHALLENGES AND SOLUTIONS/ ADAPTATIONS:** It was difficult to attract attorneys to this event. Free Continuing Legal Education (CLE) credits were offered to attendees through the Institute of Legal Studies at Albany Law School.

**i. ACTUAL OUTCOMES:** Thirteen local attorneys attended this event.

**BY THE NUMBERS (SEE FORM B) - WHAT WERE THEY AND WHAT DO THEY SAY:**

**MEDIA AND PRODUCTS (POST CARDS, FLYERS, LETTERS USED):** Hundreds of e-mail invitations were sent out by Albany Law School and the presenter in addition to personal phone calls to local firms and attorneys

**EVENT PRESS COVERAGE:** None

**j. LESSONS: BENEFITS:** Conservation on Estate Planning is becoming more common and attorneys were interested to learn about the complexity of the conservation process and the tax implications.

**k. RECOMMENDATIONS:** I would recommend that further events targeting attorneys be held in the nearby urban centers of Albany or Troy to encourage attendance. Once again, personal invitations were the most effective way of improving attendance at an event.



**TACONICS GROUP – CENTRAL FOCUS AREA  
OUTCOMES BY THE NUMBERS**

**FORM B**

| <b>Strategy 1 : WOODS FORUM #1 – July 16, 2013</b>   | Numbers of Landowners         |
|--|-------------------------------|
| In focus area  | 589                           |
| Received Post Card   | 533                           |
| Were called before Woods Forum   | 171                           |
| Attended Woods Forum   | 30                            |
| % Attendees in Target Attitudinal Group  | 51%                           |
| Attendees who received a mailed invitation   | 30                            |
| Attendees who got a mailed invitation plus phone call  | 30                            |
| Attendees who received invitation and who read about event in paper  | 5                             |
| Attendees who met with a consulting forester   | 8                             |
| Attendees who were called and encouraged to move forward (Outcome Indicator calls/How many did move forward) | 20/8 had forester site visits |
| Number of owners with new management plans   | 0                             |
| Attendees who then met with a land trust   | 2/135 ac                      |
| \$ acres/in process for protection   |                               |

| <b>Strategy 2: ESTATE PLANNING WORKSHOP #1- August 20, 2013</b>     | Numbers of Landowners |
|---|-----------------------|
| In Focus Area:  | 589                   |
| Received an Invitation:   | 533                   |
| Were called before the Estate Planning Workshop:                    | 152                   |
| Attended Estate Planning Workshop:                                  | 14                    |
| % of attendees in attitudinal group:                                | 80%                   |
| Attendees who received a mailed invitation:                         | 14                    |
| Attendees who got a mailed invitation plus phone call:              | 14                    |
| Attendees who received an invitation and read about event in paper: | 2                     |
| Attendees who signed up to meet with an attorney:                   | 1                     |
| Attendees who were called & encouraged to move forward:             | 10/ 0                 |
| Number of owners/ acres who met with attorneys to study options:    | 0                     |
| Number of owners/acres who met with land trusts to discuss options: | 1/8                   |
| \$ per acres/ in process for stewardship/protection:                | 0                     |

| <b>Strategy 3: WOODS FORUM #2 – January 5, 2014</b>  | Numbers of Landowners         |
|--|-------------------------------|
| In Focus Area  | 589                           |
| Received mailed invitation   | 533                           |
| Were called before the Woods Forum   | 110                           |
| Attended the Woods Forum   | 14                            |
| % Attendees in Target Attitudinal Group  | 30%                           |
| Attendees who received a mailed invitation   | 14                            |
| Attendees who got a mailed invitation plus a phone call  | 11                            |
| Attendees who received an invitation and read about it in the paper  | 3                             |
| Attendees who met with a consulting forester   | 9                             |
| Attendees who were called and encouraged to move forward (outcome indicator calls/ How many did move forward?) | 10/8 had forester site visits |
| Number of owners with new management plans   | 0                             |
| Attendees who met with a land trust  | 0                             |
| \$/acres in process for protection   | 0                             |

| <b>Strategy 4: Estate Planning Workshop #2 –January 18, 2014</b>   | Number of Landowners              |
|--|-----------------------------------|
| In Focus Area  | 589                               |
| Received mailed invitation   | 533                               |
| Were called before the Estate Planning Workshop  | 127                               |
| Attended Estate Planning Workshop  | 11                                |
| % of attendees in attitudinal group  | 10%                               |
| Attendees who received a mailed invitation   | 11                                |
| Attendees who got a mailed invitation plus phone call  | 10                                |
| Attendees who received an invitation and read about event in paper   | 1                                 |
| Attendees who signed up for attorney visit   | 6                                 |
| Attendees who were called & encouraged to move forward (Outcome indicator calls/ How many did move forward?) | 9/ 6 attendees met with atty.     |
| Number of owners/ acres who met with attorneys to study options.   | 6 attendees/ 3 families met atty. |
| Number of owners/acres who met with land trusts to discuss options   | 0                                 |
| \$ per acres/ in process for stewardship/protection  | 0                                 |

| <b>Strategy 5: Estate Planning Workshop for Attorneys<br/>May 29, 2014</b> | Number of Attorneys |
|--|---------------------|
| Received and e-mailed invitation   | 841                 |
| Received a personal phone call   | 10                  |
| Attended Estate Planning Workshop for Attorneys                            | 13                  |
| Attended Workshop and received personal invitation                         | 4                   |

# OVERALL REPORT OF THE REGIONAL PILOT DEMONSTRATION PROJECT

- 1) OVERALL GOALS AND OBJECTIVES
- 2) KEY OUTCOMES DESIRED
- 3) OUTLINE OF PROJECT AS INTENDED
- 4) KEY PARTICIPANTS AND ROLES
- 5) WHAT ACTUALLY HAPPENED? ACTIVITIES, ISSUES, SOLUTIONS, BENEFITS OVERALL

FORM C

a) ACTIVITIES

- i) TRAINING – STRATEGIES AND TELE
- ii) ALL-LANDSCAPE GROUP MEETINGS AND RCP GATHERINGS
- iii) RCP MEETINGS
- iv) WORK PLANS AND CONTRACTS
- v) LOCAL MATCH TRACKING
- vi) RCPS IMPLEMENTING THEIR WORK PLANS AND SOLVING PROBLEMS
- vii) NEED FOR COORDINATION CAPACITY
- viii) EVALUATION PROTOCOL
  - (1) DEVELOPMENT, REVIEW, AND TOOLS
    - (a) PROCESS INDICATORS
    - (b) OUTCOME INDICATORS
    - (c) IMPACT INDICATORS - PLANS

b) ISSUES AND SOLUTIONS

- i) WORKING WITH 3 NEW RCPS: CONTINUOUS ENGAGEMENT AND COORDINATION BY EEA, NEFA, HIGHSTEAD
- ii) EVALUATION CHALLENGED BY DIVERSE ACTIVITIES: REACH CONSENSUS ON OUR OWN EVALUATION PROTOCOL WITH SUPPORT FROM SFFI
- iii) LACK OF A MA PARTNER IN THE TACONICS BEYOND MASS AUDUBON

c) BENEFITS OVERALL (**TAKEN IN PART FROM YALE'S EVALUATION INTERVIEWS**)

- i) CROSS BOUNDARY COLLABORATION
- ii) STATE FORESTER/LAND TRUST/FORESTRY ORG ENGAGEMENT
- iii) TELE TRAINING – REWIRING THINKING ON LANDOWNER ENGAGEMENT
- iv) PEER-TO-PEER LANDOWNER EDUCATION
- v) RESULTS THAT POINT TO BEST STRATEGIES FOR ENGAGING FAMILY FOREST OWNERS IN CONVERSATIONS ABOUT THE STEWARDSHIP AND CONSERVATION OF THEIR LAND AND GETTING THEM TO MOVE FORWARD AND TAKE THE NEXT STEP TOWARDS STEWARDSHIP/CONSERVATION.
- vi) ANALYSIS OF THE RCP REPORTS
  - (1) BY THE NUMBERS- WHAT WERE THEY AND WHAT DO THEY SAY?
  - (2) CHALLENGES, ADAPTATIONS
  - (3) LESSONS
  - (4) RECOMMENDATIONS