

Vermont Land Trust FINAL REPORT

FOCUS AREA--The MA-VT Woodlands Partnership chose 6 towns in Vermont and 6 towns in MA on or near the state border to focus its landowner outreach strategies. **This is the Vermont Land Trust (VLT) report on work accomplished for Strategy #1 and #3 in the 6 town area in Vermont.**

STRATEGY # 1 (Family Forest Owner Intergenerational Transfer)

- a. LANDOWNER GROUP TARGETED-Woodland Retreat Owners
- b. DESIRED OUTCOMES FROM STRATEGY
 - As a starting point and to learn about our 6-town study area, develop a database of landowners to contact by using GIS technology. In particular, identify landowners who are enrolled in VT's Current Use Program, and landowners who have placed permanent conservation easements on their land with the Vermont Land Trust (VLT).
 - As a way to increase awareness of land conservation options, hold a Woods Forum that focuses on conservation-based estate planning.
 - For landowners to take a next step, offer legal consultations with a local attorney specializing in real estate and estate planning.
- c. MESSAGES USED (AND HOW THIS TIES TO YOUR TARGET AUDIENCE)
 - Making good decisions about the future of family lands is a critical issue facing New England's forests. In our materials, we highlighted and used language that would connect people to this message such as "family lands, part of your legacy, and shape the future of your land." This message connected with our primary landowner target: woodland retreat owners because they place high value on their lands as special places and care about their land's future.
 - The Woods Forum on estate planning was held in the afternoon on a weekday to accommodate people of retirement age or nearing retirement, who may not want to attend an evening session or can find time during the day to go to an educational workshop of this sort. Legal consultations were made at the convenience of the landowner with a local attorney.
- d. MATERIALS AND CHANNELS USED (DISCUSS WHICH CHANNELS AND MATERIALS WERE USED AND WHY, REFERRING TO THE TELE WORKSHOP)
 - A one-page flyer was sent as an email-notice to 1) a subset of the Woodland Owners Association of Windham County (about 50 individuals who have requested to get information by email), 2) people who had responded to earlier postcards designed for new landowners, as well as, 3) general easement donation prospects known by VLT in the larger watershed area.
 - The first 10 people to sign up for workshop would get a 30-minute free legal consult with estate planning attorney. The offer of a free legal consult was used as a motivator.
 - At the Woods Forum for new landowners emphasizing the Current Use Program, an announcement was made about the upcoming learning opportunity on estate planning.
- e. TIMELINE AND BUDGET—this work was conducted over a 2 year period. The budget for staff time for the GIS work plus Woods Forum and legal consults was \$9,250.

f. SUMMARY OF WHAT HAPPENED

A database and set of maps were developed for all 6 towns. This was available for the purposes of our landowner outreach activities during the contract, and will continue to be a source of information on property status, assuming the data is kept up to date by either the County Foresters and/or VLT staff. A prospecting and general outreach letter was sent in March, 2014 from VLT to 120 landowners of unconserved land in the Current Use Program giving them information on the process of conserving land through easement donations. Follow-up work continues with landowner meetings this spring/summer. 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. All outcomes were delivered as specified in the contract. See Form B for actual outcomes.

g. CHALLENGES AND SOLUTIONS/ADAPTATIONS

- The 6-town area is rather remote without community gathering places. There are many out-of-state landowners (up to 40%). Generally, people like to be left alone or they are here for rest/relaxation. They are hard to engage so conducting outreach efforts using mail was challenging.
- Many landowners reside out-of-town or state, so physically are not able to attend meetings, nor are they in an active learning mode necessarily when they are in residence.
- Getting people to think and plan ahead as to how their land might be disposed of is an easy topic to put off, just like writing a will.
- Some people when it comes to woodland management exercise benign neglect often expressed as “my woods are just there and don’t need tending.”

h. ACTUAL OUTCOMES:

i. BY THE NUMBERS (SEE FORM B)

- Number of target landowners identified by GIS mapping—own 100 acre parcels=120
- Attended woods forum on conservation-based estate planning=8
- Attendees who met with attorney for legal consult=4
- Attendees considered easement donation prospects by VLT=2

ii. MEDIA AND PRODUCTS (POST CARDS, FLYERS, LETTERS USED)—email notice, email follow-up and phone calls.

iii. EVENT PRESS COVERAGE—no event press coverage was intended.

i. LESSONS

- 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.

j. BENEFITS

- “One-on-one” sessions with an attorney regarding conservation-based estate planning are valuable and productive and would not have happened otherwise.

- The database and maps were useful for generating mailing lists, and will be used by County Foresters and VLT staff for additional outreach in the future.
- 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.

k. **RECOMMENDATIONS**

- Franklin Land Trust and Vermont Land Trust plan to stay in touch for potential joint bi-state conservation projects and planning. Highstead and other funding sources may provide some support for this coordination.
- Continue to use Woods Forum format for woodland owners with land trust and state forestry staff as cooperators.
- Keep providing ways through educational workshops for people to understand conservation-based estate planning. Another possible tactic is “one-on-one” consults whereby a landowner meets with an attorney and land protection specialist in the same session.

STRATEGY # 3 (New Family Forest Owner Outreach)

a. **LANDOWNER GROUP TARGETED—Woodland Retreat Owners**

b. **DESIRED OUTCOMES FROM STRATEGY**

- As a way to test TELE strategies, design and send printed materials that incorporate these strategies and messaging.
- In order to increase awareness of land conservation and management options, visit with new landowners and deliver welcome bags.
- As a way to give advice in an informal setting, hold a Woods Forum on Current Use Program and general topics within the field of woodland management.

c. **MESSAGES USED (AND HOW THIS TIES TO YOUR TARGET AUDIENCE)**

- Managing forests for a variety of goals is an ongoing challenge for new landowners, especially understanding timber harvests, property taxes, as well as wildlife habitat and recreational enhancement. Other messages included: keeping your woods healthy, protecting special places on your land, and passing land onto future generations.
- Our postcard used engaging photos and through our partnership we tried to emphasize that assistance was available from professionals and other fellow landowners. The Woods Forum was held in the evening at the local Grange Hall and was targeted to new landowners that had recently acquired land that was already enrolled in Current Use.

d. **MATERIALS AND CHANNELS USED (DISCUSS WHICH CHANNELS AND MATERIALS WERE USED AND WHY, REFERRING TO THE TELE WORKSHOP)**

- 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 post card 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 post card 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.
- e. **TIMELINE AND BUDGET**—this work was conducted over a 2 year period. The budget for staff time for the activities was \$4,050.
- f. **SUMMARY OF WHAT HAPPENED**
 The Partnership spent a good deal of time on designing and editing the postcards and letter for this outreach strategy to new landowners trying to incorporate TELE strategies that we had learned as part of our training. We received input from our trainers before mailing them out. The interest in visits and receiving the welcome bags was very low. Thirty (30) bags were assembled and over the course of the contract, these materials were disseminated, but not all went to the original targeted audience. The bags were given out at Strolling of the Heifers (woodlands expo tent in 2013 and 2014) and at our two Woods Forums.
- g. **CHALLENGES AND SOLUTIONS/ ADAPTATIONS**
- We started with a list of 50+ landowners. Several mailings were returned with bad addresses, coupled with many being out-of-state, causing the potential pool to grow even smaller.
 - With the poor response to our postcard/letter, we made other attempts at getting the welcome bags into the hands of people who could benefit from them.
 - There were not enough active, well-known VT Coverts cooperators in the area so it was hard to implement this plan to make neighborly contact with new landowners. Out-of-state landowners offer up a particular challenge too being only around on weekends or when they are on holiday/vacation.
- h. **ACTUAL OUTCOMES:**
- i. **BY THE NUMBERS (SEE FORM B)**
- Number of new landowners receiving postcard/letter=46
 - Number of new landowners requesting a visit=4
 - Number of welcome bags distributed by VT Coverts volunteer=4
 - Number of welcome bags sent by US mail=4
 - Number of welcome bags distributed at Woods Forum=8
 - Number of welcome bags distributed at forest expo at Strolling of the Heifers=14
- ii. **MEDIA AND PRODUCTS (POST CARDS, FLYERS, LETTERS USED)**—postcard, letter, return postcard, welcome bags with logo, banner used at forest expo and Woods Forum.
- iii. **EVENT PRESS COVERAGE**—no event press coverage was intended.
- i. **LESSONS**
- The out-of-state audience was difficult to engage.
 - Some “new” landowners were not actually new but had bought more land in their town, and/or several of the names were experienced landowners, so their non-reply was not terribly surprising. This may have been too narrow of an audience to engage.

- State boundaries were an obstacle for event cross-over. Massachusetts and Vermont events were duplicated in each state.
- Be clear about whether your goal is quantity (numbers at the events) or quality (targeted audience) 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.
- Lots of time was spent discussing, creating, and tweaking a database to evaluate landowner participation at various events, but it was not well used due to technical access issues, and with low turn-out in general, the numbers were easily managed independently.

j. BENEFITS

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

k. RECOMMENDATIONS

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

Attachments

Map of 6 towns—showing Current Use (UVA parcels) and lands under conservation easement

Estate planning workshop e-notice

Post card for new landowners

Letter to new landowners

Reply postcard

2nd post card

Woods Forum post card

UVA Parcels in the NEFA Project Area

Legend

- UVA Parcel
- VLT Conserved Land
- Land Conserved by Other Non-profits
- State Easement
- Municipal Land
- State Land
- Federal Land

0 0.5 1 2 3 Miles

