

2017 – 2018 Extension Activity & Outcomes

Paul Catanzaro – Extension Associate Professor
50% Extension Appointment

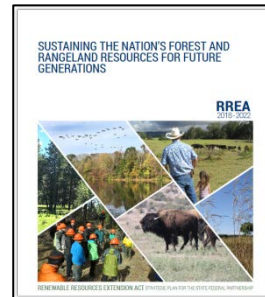
Extension Situation Statement and Philosophy

There are over 47,000 family forest owners who own 10 or more acres of land, living in 351 communities across Massachusetts. I am charged with increasing forest conservation by informing the decisions of these 47,000 landowners across the state who collectively own 70% of our forests. I have a 9-month appointment with a **50% extension allocation**. That translates into .4 FTE dedicated to reaching the family forest owners deciding the future of our landscapes. In order to effectively inform these decisions in my limited time, I focus on research-based outreach strategies that can amplify my efforts and am strategic on the critical issues I address. Below are descriptions of my five main extension initiatives.

Accomplishments of Particular Note for 2017-2018

Leading the Way on Legacy Planning

Your Land, Your Legacy was featured as a “highlighted program” in USDA’s new national Renewable Resources Extension Act (RREA) 5-year strategic plan.



Amplified Impacts through Peer-to-Peer

Based on the 2018 Keystone activity survey:

- Keystone Cooperators contributed **42,054 hours** to conservation-related activities, **53% of which were volunteer hours**. This is equivalent to **>21 full-time** conservation positions, of which **11 positions were volunteer**.
- Based on the hourly rate of \$24.69 for an hour of volunteer time, Keystone Cooperators contributed **\$549,550** worth of volunteer time.
- Keystone Cooperators own or are involved with the management decisions on **320,514 total acres** of land.

Initiative One: Conservation-based Estate Planning Outreach for Landowners

Background: Impact through critical issues

Over 70% of the forests of Massachusetts are family forests. 73% of forested parcels in Massachusetts are owned by people over 55 years old. We are in the midst of the largest transfer of land that we have ever seen. It is at these times of land transfer that forests stand the greatest chance of being converted to other uses (e.g., houses) or parcelized into smaller properties. The decisions these landowners make about the future of their land will shape our landscapes and the benefits they provide (or don't provide!) in the future. This is the critical issue of our time. Therefore, I have developed a tightly integrated research/extension program to help landowners understand their conservation-based estate planning options. The work of this initiative is done in collaboration with the Franklin Land Trust and Mount Grace Land Conservancy and is funded by the MA Department of Conservation and Recreation. This work also provides fertile ground for the development of a robust research program investigating how families make decisions about their land. The work of this initiative is having national impact as other states use my work as a model for the development of their programs, as described below.

Role: P.I./Project Leader

- lead author on print and web-based outreach material
- content expert for programs
- organize partners & liaison with the funder
- provide research based input on best practices for reaching landowners
- project evaluation
- budgeting
- reporting

% FTE: 20%

Activities and Outcomes:

Attracted Funding for 2019 Fiscal Year

- Received a \$115,000 contract from the MA Department of Conservation and Recreation to develop and deliver legacy planning programs to MA landowners.

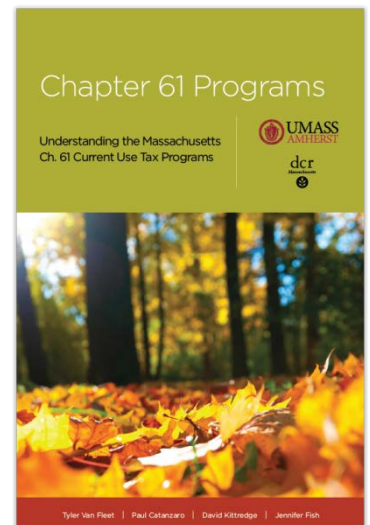
New publication: “Using a Will to Pass on Your Land”

- Our quantitative research shows that the most common tool that landowners use to pass on their land is a will. However, our qualitative research suggests that landowners do not always use the will correctly and may assume that a will does more than it really does. In order to help maximize landowner use of their will I developed an outreach publication.



Revised “Ch. 61 Programs: Understanding the MA Ch. 61 Current Use Tax Programs” publication

- The Ch. 61 current use programs provide landowners reduced property taxes in exchange for their commitment to keep their forest in managed forest, agriculture, or open space. The programs are complicated and a constant source of confusion for both landowners and assessors. First published more than five years ago, the Ch. 61 outreach publication is perhaps the most popular of my publications. In fact, we ran out of copies. This year I worked with MA DCR to revise and update the publication and do a new printing.



Landowner Events

- 3 basic conservation-based estate planning landowner outreach events (Williamsburg, Russell, and New Salem) that reached **48** landowners who collectively own **over 3,000** acres of land. The New Salem program was done in partnership with “Land for Good” and targeted farmers with forestland.

Landowner Mailing

- More than 500 landowners received our “Your Land, Your Legacy” and “Using a Will to Pass On Your Land” publications through a direct mailing of these publications.

Woodland Connections for Women (WCW)



PLEASE JOIN US! SATURDAY JUNE 16TH

Women in the Woods

An opportunity to walk and talk with other women woodland owners



Saturday June 16th
10am-1pm
586 Briggs Road, Athol
LUNCH PROVIDED
-all ages welcome-

Join us at Susie Feldman's 300+ acre
Cutthroat Brook Tree Farm in Athol

- Walk around the brand new Forest Learning Loop, an interactive trail designed by Susie
- Hear about Susie's habitat management projects
- Connect with other women interested in land management and conservation

Please RSVP by
Wednesday June 13th to
Sarah at
wells@mountainstate.org OR
978-246-2055 x23



Research and experience have demonstrated that women play a particularly important role in landowner decisions regarding the future of the land. WCW events were designed to give women a safe, supportive atmosphere to learn about their land and options for its conservation. This year we organized and delivered **3** events (Hubbardston, Athol, Ashfield) that attracted **37** women. Evaluations from tell us that women value most the opportunity to share information and meet other women landowners. In addition:

- 50% said that that the all-women nature increased their likelihood of attending
- 80% noted that it did increase their enjoyment and value of the program

"What was so wonderful about it (other than the Cream Tea!) was connecting with a group of women who care about--and have a stake in--our forest, garden, landscapes, and who brought such a wealth both of knowledge and of questions. I felt like I could find any answer to anything among them and their resources. Women networking -- now there's a force of nature!"

Jane Conor, Hubbardston

Forester Training

- Foresters interact with many landowners who in total own thousands of acres of land. Foresters are therefore an important group to reach with conservation-based estate planning training. This year we trained foresters through **one webinar**, reaching 10 foresters who serve in a variety of ways giving them multiple opportunities to inform landowner decisions.

Online tool development

- Creating an online tool to help landowners think through two important questions: 1. do they want to determine who will own the land next? and 2. Do they want to control the future use of the land? The tool provides next steps and information based on their answers. The tool is in the final stages of development and then will be tested by a focus group.

Open Space Committees Small Grant Program

Community Open Space Committees represent an outstanding opportunity to serve as credible sources of locally relevant information about conservation-based estate planning. Our work targets these all-volunteer efforts to reach their neighbors with conservation options. In doing so, we harness the power of peer networks and amplify our reach and impact. Below are descriptions of the activity of this year's small grant recipients:

- *Open Space Networking Lunch*: 24 people representing 10 towns in the Metrowest region of Boston, gathered for an informal collaborative and networking lunch in Acton to discuss open space in the region. The group was made up of a combination of Open Space Committee members, Land trust professionals, conservation and recreation agents, land stewards, and other dedicated volunteers.
- *Winchendon*: The Conservation Agent identified three focus areas for conservation and identified dozens of landowners who might be prime prospects for considering conservation restrictions. These landowners will be mailed packets of information to help inform their next land-based decisions.
- *Athol*: Focused on efforts to communicate the value of their currently conserved land in response to community concern that more conserved was not needed since the current land don't get used. Signage and a video were created with the funding.

Initiative 2: Keystone Project – www.MassKeystone.net

Background: Using influential community opinion leaders to inform landowner decisions

Respected friends and neighbors are often cited by landowners in research as the most important source of information about their forest conservation decisions. Peer-to-peer learning is therefore an effective way to amplify my outreach efforts by providing the information people need in the hands of those they naturally turn to for information. The Keystone Project invests education and reference materials in important, **keystone people**, such as large landowners, members of municipal board members, watershed associations, and land trusts. See attached list of those trained this year. There is a competitive application process (60-80 applications a year for 20-25 spots) that allows us to choose those people with the highest likelihood of informing decisions, such as those who are involved in multiple organizations and a history of community activism.

In exchange for the training and take-home resources, graduates of the program, called **Cooperators**, agree to return to their communities and volunteer at least 30-hours of their time towards projects that promote forest and wildlife conservation. Cooperators have an intimate knowledge of the local interests, issues and the people within the community and therefore are in the best position to move conservation forward. Cooperators also become a part of a statewide network, available to help each other and acting as a local contact for setting up and marketing UMass outreach programs and resources. This model has evolved over the 30 years of its existence and, based on most recent evaluation results below, has shown itself to be a very effective initiative.

Role: Project Coordinator

Activities:

- Organize the entire 3 ½ day training, including reserving the location and hiring a caterer
- Attract funding (Harvard Forest, Mount Grace, MA DCR) & manage the budget
- Purchase 25 sets of resources materials (15-20 publications per participant)
- Solicit applications and choose the invited participants from 60-80 applications
- Develop the weekend long program & invite speakers
- Provide 4 presentations & facilitate the entire weekend
- Identify sites for field tours & lead walks
- Evaluate the training
- Develop final reports to funders

% FTE: 15%

Outcomes:

2018 Keystone Project Training Evaluation:

Note: the full evaluation has been uploaded to my AFR.

Participant evaluation of my four presentations on a 10-point scale:

- Forest ecology: **9.6**
- Elements of timber management: **9.3**
- Restoring old-growth characteristics: **9.5**
- Increasing forest resiliency: **9.2**

Participant evaluation of the overall program (10-point scale): **9.1**

Overall Keystone Project Evaluation for the Entire Keystone Network:

Every other year, I evaluate the program's effectiveness through a mail survey to approximately 500 Keystone Cooperators using the Dillman Total Survey Design Method (approximately 20 hours of time). The survey seeks to quantify the total impact that Cooperators made in the previous 12-month period. Below are some of the key results from the 2018 evaluation I conducted this past spring to help describe the impacts of Keystone.

- Keystone Cooperators contributed an astounding **42,054 hours** to conservation-related activities, **53% of which were volunteer hours**.
- Keystone Cooperator activity is equivalent to **>21 full-time** conservation positions, of which **11 positions were volunteer**.
- Based on the estimated value of \$24.69 for an hour of volunteer time (<https://independentsector.org/value-of-volunteer-time-2018/>), Keystone Cooperators contributed **\$549,550** worth of volunteer time.
- Keystone Cooperators own or are involved with the management decisions on an astounding **320,514 total acres** of land.
- Keystone Cooperators made contact with **18,823** people about forest conservation.
- Keystone Cooperators made **7,304** referrals to conservation information resources. Referrals to land trusts, government programs, private foresters, and public foresters were most common.

This survey demonstrates the power of working with well-connected, influential Keystone people. The acres impacted and people reached are far beyond what I can do alone with my .4 FTE of extension!

Initiative 3: Forest Resiliency

Background: Addressing Critical Issues

We are now facing an uncertain future, in which our forests will encounter many challenges, including land conversion, invasive plants, insects, and diseases, heavy deer browse, and climate change. Though our forests are resilient, they also have characteristics that make them vulnerable to these stressors to varying degrees. While there is uncertainty as to how our forests will react to these stressors, we can be confident that our forests *will* change. It is possible to increase the resiliency of forests to current and future stressors by increasing the characteristics not currently a part of your forest that will make them more resilient.

Role: Project Coordinator

% FTE: 10%

Activity:

- American Forest Foundation Grant: Received a \$6,000 grant from the American Forest Foundation (AFF) to re-print my "Increasing Forest Resiliency for an Uncertain Future" publication. AFF uses the publication for their outreach in the Northeast and wanted to pay for a printing as their way of saying "thank you."
- Emerald Ash Borer: Collaborating with a colleague at Harvard Forest to set up long-term monitoring plots to evaluate the impact of emerald ash borer on our forest. The goal is to use this work to develop forest management recommendations for foresters and landowners. Our team submitted a NIFA proposal to fund this work.
- Forest Carbon: I am currently writing an outreach publication on forest carbon and the important consideration for forest management. It is my goal to have this completed by Spring of 2019.

Initiative 4: www.Masswoods.org

Background: Amplifying my impact through internet resources

Surveys confirm that landowners often turn to the internet for information about their land. It is an efficient tool that allows landowners to find information at their convenience, when they need to make a decision. The internet also offers the opportunity to develop tools to help landowner find people and information they need and therefore helps me, in my limited capacity, amplify my efforts.

Launched in 2005, MassWoods.net is a dynamic website which strives to inform landowner decisions. In addition to serving as a resource, the site features a contact database listing land

trusts, professional foresters, and estate planning professionals working in every town in the states and also includes on-line calculators that help landowners determine their property taxes under the state’s current use tax program. The site also features case studies highlighting landowners conserving their land as a way to further use peer learning. The website is enhanced by a ‘Constant Contact’ e-newsletter and Facebook page that help market the site.

Role: Webmaster/Project Coordinator

% FTE: 5%

Activity:

- Generated new content for the site.
- Changed the site from MassWoods.net to MassWoods.org
- Sent out four Constant Contact four constant contact e-newsletters to over 1,500 landowners, land trusts, community leaders, and natural resource professionals each time, to help drive visits to MassWoods.
- Worked with the MA DCR to update Ch. 61 current use tax program calculator to the current year’s rates
- Develop Facebook posts to market content on the site

Outcomes:

Metric	Result
Sessions	20,813
Pages/visit	1.98
Avg. Visit Length	1:56
Find a “Local Professional” page	1,165
Visits to “Future of My Land” page	2,420
Visits to “SNE Stumpage Survey” pages	7,570
Visits to “Landowner Programs page	1,327
Visits to “Ch. 61 Current Use” page	6,820
Visits to “Caring for my Land” page	1,915
Visits to “Forest Resiliency” page	201

Initiative 5: Southern New England Quarterly Stumpage Survey

Background: Collecting data to inform decisions

The Southern New England Quarterly Stumpage Survey (<https://masswoods.org/southern-new-england-stumpage-price-report>) is the longest record of stumpage prices in the northeast. It is used by practitioners, policy makers, and researchers.

Role: Project coordinator

FTE: 5%

Activity:

- Moved the stumpage survey from a mail survey to an electronic survey by harvesting email lists of foresters, loggers, and mills across southern new England, creating an online survey, contacting folks to alert of them of the change and then implementing the quarterly report through an all-electronic format.
- Generate summary statistics
- Post on www.MassWoods
- Share with partners (e.g., MA DCR)

Impact:

- The results are used by the MA Dept. of Revenue to establish the current use value of Ch. 61/A forestland that provides landowners a significant reduction in their property taxes.
- Results used by landowners when making forest management decisions
- Results are used by foresters and the wood products industry to evaluate the current market price of timber
- These are the most visited pages on MassWoods!