

Looking Forward II
Oregon Families & Their Forestlands: What's at Stake

Proceedings of a Conference
April 27-28, 2007
Oregon State University

Sponsored by the Oregon Board of Forestry and
the Committee for Family Forestlands

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Contents

Dedication	4
Overview and Remarks by Gary Springer	5
Survivability Challenges	7
Symposium Protocol	8
The Best Ideas	9
Discussion	13
Other Good Ideas	15
The General Sessions	
Welcome and conference overview	16
General Session I: The Context	16
General Session II: Strategies to Sustain Family Forestlands	17
General Session III: Working and Gaining Support Within the Political Arena	19
General Session IV: Moving Forward	22
Closing Remarks by John Bliss	25
Appendices	
A. The white paper (review of regional roundtables)	27
B. Results of breakout-group discussions—the long form	37
C. The symposium agenda	43

Dedication

This proceedings is dedicated with respect and affection to Arlene Whalen. Arlene worked for the Oregon Department of Forestry in public information for six years and was a moving force behind organizing this symposium. She attended some of the regional roundtables and helped to prepare the white paper that summarized those discussions. She even furnished the photo that appears on the cover of the symposium's agenda—a snapshot of her husband, Mike, and their grandson, Dawson.

Arlene was too ill to attend the symposium. She died at home on May 4, 2007.

Arlene brought great passion and skill to the task of telling the forestry story in compelling, human terms that would resonate with broad audiences. She worked tirelessly to explain the many values of family forestlands and to convey the satisfaction and challenges that owning them can bring. She was a creative, hardworking, cheerful, and loyal colleague, and she will be missed.



Overview and Remarks

Gary Springer, forestland owner and moderator

The Committee for Family Forestlands (CFF) and the Oregon Board of Forestry co-sponsored a successful second family forestland symposium (the first one was held in 2001) at the LaSells Stewart Center on the OSU campus in late April.

The symposium marked the second and third days of a very busy three-day run for both the CFF and Board of Forestry in the Corvallis area. The day before the symposium (April 26) the board met for its regular business meeting in Corvallis, while the CFF and Oregon Small Woodlands Association (OSWA) members met for the 2007 OSWA annual meeting at Adair Village. The Benton County OSWA chapter hosted three field tours that day, and then nearly all the Board of Forestry members were able to join us at the standing-room-only banquet that night.

This year's symposium, "Oregon Families & Their Forestlands: What's at Stake," was designed to take some of the most important "survivability issues" for family forestlands and turn them into an action plan. This action plan will have elements for the Committee for Family Forestlands, Board of Forestry, OSWA, Extension Service, Department of Forestry and others to work on in the coming years.

The hard-working symposium participants developed a "Top 10 Solutions" list. When you read through the list some clear themes emerge: intergenerational land ownership and land management transfer; development of markets for traditional and non-traditional forest products (including something new called "ecosystem services"); better understanding and sharing of values between landowners and the non-landowning public; adapting to changing social and environmental climates. You will read much more about these themes as the various groups listed above grapple with them.

The symposium's general-session speakers and the participants in the small-group breakout sessions produced a number of ideas for positive action, and offered examples of work already being done by both individuals and groups to address some of the family forestland challenges listed above. It is not as if all landowners are waiting around for someone to solve their problems for them. One of the important take-home messages from this event was that we need to do a better job of ferreting out good ideas that are already showing promise and expand upon them.

On behalf of my fellow CFF members and the Board of Forestry, I would like to thank the many organizers, sponsors, speakers, and exhibitors who contributed to the success of the symposium. It took much time, energy, and money from a broad coalition of individuals and organizations to bring this event about. That effort was much appreciated!

Looking Forward II
Oregon Families & Their Forestlands: Proceedings of a Symposium
April 27-28, 2007
Oregon State University

I also want to thank all the people who attended. They took two days out of their busy lives to work for the good of all of Oregon's family forestland owners. Thanks also to Oregon landowners who harvested and sold timber this past year! Your harvest-tax dollars support the Oregon Forest Resources Institute (OFRI). OFRI was the primary funding source for the symposium and the regional meetings leading up to it, and that helped keep registration costs low.

We also want to recognize a few "worker bees" within the public agencies and OSWA whose work on this event, from start to finish, was critical. They are Mike Cloughesy (OFRI), Viviane Simon-Brown (OSU Extension), Joe Holmberg (OSU College of Forestry), Mike Gaudern (OSWA), and Arlene Whalen (Public Affairs at ODF).

On a very sad note, Arlene Whalen was too ill to attend the symposium that she had put so much of her energy and time into. She died at home on May 4, just one week after the symposium. Arlene's talent, good humor, and dedication to Oregon's forests and the well-being of family forestland owners will be greatly missed by her colleagues at the Department, by the Committee for Family Forestlands and by me. Our sympathy goes out to her husband, Mike, and to her family.

In his remarks at the Symposium, Board of Forestry chair Steve Hobbs posed the following challenge:

"We need to develop new state policies that will positively affect family forestland owners over *multiple* generations. What are the most important public policies influencing continued family forestland ownership? How can we better organize ourselves to influence these policies?"

Stay tuned and be prepared to help as we develop a family forestland action plan and search for answers to Steve's questions. There will be roles to play for the Board of Forestry, Committee for Family Forestlands, OSWA, Tree Farm, Extension Service, ODF, and conservation groups sympathetic to the cause of maintaining the Oregon family forestland base. But this is more than a "what are they going to do?" question for those organizations and their leadership. To successfully shape a positive future for Oregon's family forestlands, we need to address what *we* are going to do, individually and collectively, to protect our future.

PowerPoint presentations from the symposium and outcomes of the discussion are posted at the OFRI website (<http://www.oregonforests.org/conferences/ffl>). Information about the Committee for Family Forestlands can be found at the Oregon Department of Forestry website (www.oregon.gov/ODF).

Survivability Challenges

The symposium “Oregon Families & Their Forestlands: What’s at Stake” was attended by family forestland owners from all over Oregon, as well as many other interested people. As every attendee was well aware, family forestland owners face a variety of challenges. It is hard to make a living operating a family tree farm. Competition both domestic and foreign, loss of mill and other infrastructure, often-burdensome regulations, intermittent (and generally low) return on investment, disagreements with neighbors on social values, an unstable land-use environment, uncertainty about how to pass the land to the next generation—all these issues and more were thoroughly aired by speakers and small-group participants.

But not all news was bad. Participants firmly acknowledged the joys and opportunities of being a family forestland owner. They talked of emerging markets for such ecosystem services as carbon sequestration and wetland mitigation, and for other non-timber services such as hunting. They talked of the prospect (still largely theoretical) of societal recognition for contributing to watershed health, clean air, wildlife habitat, and beautiful views. Some spoke of their efforts to reach out to neighbors and urban communities in constructive dialogue. They told of inviting schoolchildren and others to tour their lands and learn about tree farming. Many family landowners are now engaged in such conversations, and many others are looking for ways to start.

The overall message arising from the two-day conversation was that, even with all its demands, most family forestland owners know they have a good life—good for themselves, good for their neighbors, good for society. There was a firm consensus that finding solutions to the challenges, even the really tough ones, is worth the time and effort.

However, participants agreed that there are too many issues to address all at once. Some winnowing is needed—a targeting, a narrowing of focus, making possible a concentration of effort.

Symposium Protocol

The task faced by attendees of the symposium was to consider the whole complement of family forest issues and then work to narrow and distill them into a few practical recommendations for the Committee for Family Forestlands and the Board of Forestry.

The agenda (please see Appendix D) included four general sessions with intervening breakout sessions. Each attendee was assigned to one of 20 facilitated breakout groups, each with 10-24 members, and remained with that group for the duration of the symposium.

Breakout groups met for three long meetings. Members discussed the issues that emerged from five regional roundtables held through Oregon earlier this year (please see Appendix A for a detailed review of those issues) and generated a few practical, workable solutions that could be incorporated into an action plan.

In proposing their solutions, groups were asked to keep in mind the acronym SMART. The best solutions would be **specific, measurable, achievable, realistic, and timely**. Over the course of the two days, each group was asked to distill its best ideas down to their concentrated essence, making them concise enough to fit onto one flipchart page.

The final activity of the symposium was a Walkabout and Vote. Groups displayed their solutions. Participants “walked about” the big room, examined each solution, and voted for the ones they deemed important enough to forward to the Board of Forestry and Committee for Family Forestlands. The next step is for those two bodies to create an action plan based on these solutions.

The Best Ideas

The top 10 vote-getting solutions are listed below:

1. 63 votes

Issue: Uncompensated services

Solution: Incentives

For the '09 legislative session, the Board of Forestry and Committee for Family Forestlands create and advocate for state and federal incentive legislation including:

- A carbon credit program that is mandatory for polluters and voluntary for family forestland owners
- Exempt standing timber value from value of the estate
- Financial incentives for maintenance of buffers for water, fish, wildlife, ESA, etc.
- "Hold harmless" to shield family forestland owners from liability for trespassers on their properties

2. 59 votes

Issue: Uncompensated services

Solution: Incentives

Provide financial incentives to reward family forestland owners for voluntary conservation practices that exceed forest practices regulations

Use renewable stewardship and/or conservation agreements to gain access to:

- Reduced state inheritance tax liabilities
- State and federal income tax credits
- Protection from liability ("hold harmless" agreements) to encourage access of public to family forest lands
- Ability to sell tax credits
- Accessibility to cost-share dollars for ecosystem improvements
- Have payments for carbon sequestration linked to these agreements

3. 54 votes

Issue: Intergenerational transfer

Solution: Tools for profitability and conservation

- Collaboration
- Financial incentives
- Conservation easements (for example, payments for sale of development rights, fishing and hunting rights, water rights, recreational rights, carbon rights)
- Market enhancement
- Transfer liability to state in exchange for public access
- Education of public and urban dwellers
- Access to science and technical assistance
- Improve land use planning: increase private flexibility, retain public value

4. 44 votes

Issue: conflict of values

Solutions: Education and outreach

- More intensive public education, such as is done by the sponsors of this symposium and public educators
- Sponsor and support family forestland tours for the public and for schoolchildren
- Reach out to new rural property owners to explain the management and values of the forestland
- Promote opportunities for older children to visit and work on tree farms

5. 44 votes

Issue: Global climate change

Solution: Embrace new tools for new times

Global climate change is an opportunity for family forestland owners:

- To demonstrate how management practices align with societal values
- To create job and business opportunities that improve economic conditions and the environment
- To stimulate synergy between environmental groups, growers, manufacturers, and consumers
- To reconnect urban and rural Oregonians through the marketplace

6. 40 votes

Issue: the delivery mechanism for influencing stewardship and sustainability is not effective for either participating or non-participating groups and individuals

Solutions: Improve delivery

- Education, targeting message content to specific audiences
- Form new coalitions.

Examples of improved delivery mechanisms around intergenerational succession and transferring values:

- Train all foresters who interact with SWOs to engage in dialogue about Ties to the Land program
- Identify opportunities to engage SWOs who are not engaged around Ties to the Land program
- Use family values to build grassroots support
- Build new public/private/corporate/industry coalitions

7. 35 votes

Issue: economic challenges of family forestland owners

Solution: Local lumber for local projects

- Tree Farmers' Markets in local communities
- Build awareness of and pride in local sources (e.g., "My neighbor grew the lumber for my house")
- Get on "Oregon Field Guide"

8. 32 votes

Issue: engaging the wider community of family forestland owners

Solution: Educate and reach out to *uninvolved* family forest landowners

- Develop informed, motivated, and involved family forest landowners who can communicate effectively with wider community.
- Develop partnerships and identify leaders in NGOs to assist in training, creating cohesive interests, new funding sources, and communication/education materials.
- For managing family members: increase capacity of family forestland owners to work with elected officials at local and state levels and with state and other regulatory agencies.
- For nonmanagers/nonmembers: increase knowledge of value of managing forests.
- Provide education to larger community: neighbors, policy/decision makers, general public

9. 27 votes

Issue: viability of family forestlands

Solution: Establish a green-credit forest fund

Such a fund will provide annual payment for conservation easements on family forestlands that provide public benefit. Avenues to establish the fund could include conservation nonprofits and/or government agencies and existing mitigation funds. Funding would come from development charges or “green” payment from consumers.

10. 22 votes

Issues: viability of family forestlands, values conflict with urban neighbors; unpaid services

Solution: Create a multi-level set of performance standards to enhance current single-level Forest Practices Act. Focus on on-the-ground performance. How it might work:

Levels	Standard (buffers, carbon sequestration, etc.)	Policy incentive	Market incentive
Top	Highest level of ecological value	(Identify policy incentive)	(Identify market incentive)
Middle	A management plan		
Base 1	Current Oregon Forest Practices Act		

This helps:

Looking Forward II
Oregon Families & Their Forestlands: Proceedings of a Symposium
April 27-28, 2007
Oregon State University

- The public (consumers), who will have market options and thus will have more reason to be supportive of local producers of wood products
- The family forest owner, who will be encouraged toward high standards of operation
- Agencies and public, because it improves mechanism to maintain and build public values
- Businesses, because it offers means to better respond to market demands

These multi-level performance standards could be promoted to the public to communicate and value of family forestlands.

Discussion

For most symposium participants, **compensation for ecosystem services and other societal benefits** is clearly the most urgent challenge. Five groups (#1, #2, #3, #9, and #10) addressed it in slightly different forms. A synthesized list of solutions from these groups includes:

- Develop financial incentives (cost-share programs, others) for maintaining and enhancing environmental values and services
- Reduce state inheritance taxes
- Develop and increase access to market for carbon sequestration
- Enact “hold harmless” agreements protecting landowners from trespasser liability lawsuits
- Enact tax credits for keeping land in forest
- Create a “green credit” forest fund to pay for conservation easements on family forestlands
- Develop a multi-level set of performance standards, with policy and market incentives for managing to stricter environmental standards than those in the Forest Practices Act
- Improve Oregon’s land-use planning process to increase private flexibility while retaining public value

The next most important challenge is to **solve the conflict of values, reach out to the wider community and build on common ground**. Two groups (#3 and #8) addressed this issue, generating these solutions:

- Develop more intensive public education on forestry and family landowner issues
- Organize more family forest tours for the public and school children
- Increase capacity of family forestland owners to engage the wider community and elected officials
- Partner with NGOs to find funding, provide training, and develop educational material
- Reach out to rural property owners with diverging views
- Promote work opportunities for older children

The third most important challenge is to take advantage of **opportunities presented by global climate change**. The group that addressed this problem (#5) looked past the financial incentives of carbon banking to make the point that the public alarm over global climate change offers an opportunity to align the interests of family forestland owners with those of the larger society. In this way, this group’s solutions also address conflicts of values and outreach to the community.

This group proposed that family forestland owners:

- Demonstrate how management practices align with societal values

- Create jobs and business opportunities that improve economic conditions and the environment
- Stimulate synergy between environmental groups, tree farmers, manufacturers, and consumers
- Reconnect urban and rural Oregonians through the marketplace

The fourth most important challenge is to **improve the delivery of stewardship information to family forestland owners**, targeting particularly those who are not now being reached. The solutions proposed by the group that addressed this need (#6) also echo concerns about conflicts of values and outreach to the community. Group #6 proposed the following solutions:

- Train foresters who interact with family forestland owners to talk to them about the Ties to the Land family succession program
- Use the Ties to the Land program to engage landowners who are not now being reached by any forestry stewardship programs
- Build new coalitions among public agencies, private citizens, and industry

The fifth most important challenge is to **expand markets for locally harvested forest products**. The group that addressed this issue (#7) proposed these solutions:

- Develop local farmer's market-style markets for wood products
- Build awareness of and pride in using locally grown wood and other products
- Improve marketing and public relations efforts on behalf of local wood products (the example given was "Get on Oregon Field Guide")
- An example of this is the Build Local Alliance (buildlocal.org)

These proposed solutions resist neat categorization under their various topic headings. Rather, they overlap with one another to address several problems at a time, testifying to the interwoven nature of the challenges faced by family forestland owners.

Other Good Ideas

Because the symposium's objective was to offer a limited number of practical solutions, the top vote-getters are likely the best framework for an action plan.

However, many other good ideas emerged from the symposium. Some are contained in the full complement of solutions from all 20 breakout groups, which appears in long form in Appendix B. Others are contained in summaries of comments from general-session presenters.

A distilled (and probably incomplete) list of these ideas is below. Some require concerted cooperative action and political change, but many are practical steps that forestland owners can take without waiting for action from any official body.

- Partner with Oregon Tourism for an interpretive “Roadside Family Forests of Oregon” program
- Work toward a reasonable modification of Measure 37
- Work toward modifications of state and federal estate-tax law
- Increase availability of conservation easements through land trusts
- Advocate for a development pattern of denser housing and more open space
- Promote active management on federal forests
- Encourage adequate funding of state service-forester positions
- Promote understanding of family forestland owners as distinct from public forest agencies and the forest industry
- Adopt a formal business organization for your tree farm
- Do short-term, low-cost stock improvements
- Minimize fire and trespass liability issues by making breaks and putting up signs
- Put up “Family Forest” signs along roads
- Work with neighbors to build understanding and tolerance on both sides of the fence. Have one-on-one conversations with neighbors, family, friends, and “opponents”
- Keep your management plan updated and share it with family
- Talk with family and friends about successional issue—and then do something about it. Reward the kids who are interested
- Show your love for the land
- Enjoy the process. Be proud of what you do for your family and society
- Become political. Build relationships with elected officials
- Become competitive on specialty rather than commodity products
- Be a constant learner
- Take our own advice: Buy local, Buy smart, Buy green, Buy innovation, Buy the future, Buy fun, By God, support Family Forests
- Tell our stories to whomever will listen

The General Sessions

Welcome and conference overview

Anna Starker May and Justin Heffernan spoke of the challenges and rewards of being the fourth and the second generation, respectively, to take responsibility for their family's lands.

General session I: The Context

Tom Nygren, family forestland owner (moderator)
Hal Salwasser, Dean, College of Forestry, OSU
Steve Hobbs, Chair, Board of Forestry
Ron Cease, Chair, Committee for Family Forestlands

Tom Nygren

“Facing the Future: What’s at Stake?”

The issues that emerged from the 2001 Family Forestland Symposium were intergenerational transfer, taxes, land use, and regulations. There are promising new developments in these areas, such as the online forest products directory and the Ties to the Land succession education package. Public surveys show greater appreciation of family forestland owners now than they did a few years ago, but landowners still feel they are not listened to. New issues that have emerged since 2001 are global climate change, federal land management, and a policy bias against east-side forest owners. These issues need to be addressed along with the earlier ones. The results of this symposium will be considered by the Board of Forestry and the Committee for Family Forestlands as they implement policy on behalf of family forestland owners.

Hal Salwasser, Dean, College of Forestry, OSU

“Forests for a richer future: Conditions and trends affecting family forestlands in Oregon”
(Powerpoint presentation available on OFRI web site.)

Steve Hobbs, Chair, Board of Forestry

“Public policy implications”

Family forestlands occupy an important niche in Oregon’s landscape, providing ecological benefits at lower elevations in the face of growing urbanization. The most urgent public policy issues affecting family forestlands are:

- Reduction in federal harvests and subsequent loss of manufacturing infrastructure
- Growing urban and suburban populations that are unaware and unappreciative of the value of forests for providing material and other needs
- Lack of funding for ecosystem services provided by family forests
- Lack of public investment in forestry research and education
- Conversion of forestlands out of forest use

Public attitudes are becoming more accepting of forestry. Global climate change provides opportunities for carbon banking as well as demand for local sources of energy. Opportunities exist to develop new markets.

Ron Cease, Chair, Committee for Family Forestlands
“Public Policy Implications”

“Pessimism is a primary source of passivity” (quoting the historian Barbara Tuchmann). From 1999 to 2000 he chaired the Forest Practices Advisory Committee on Salmon and Watersheds (FPAC), whose report and recommendations were part of the Governor’s Oregon Plan. One recommendation of FPAC was to create three new riparian-specialist positions in the Oregon Department of Forestry. The positions were placed in the department’s budget, but never funded. The department has therefore been hindered in providing needed stewardship services. Governor Kulongoski’s budget restores some of what has been cut from the department’s budget, including the three riparian positions, but this Legislature is unlikely to approve everything the governor proposed.

Federal harvest reductions affect ODF finances because some of the ODF budget comes from federal funds, which are dwindling. Land use continues to be contentious. Some people want to fix Measure 37; others think it is all right as it is. Some large timber companies are developing their land into 20- to 80-acre homesites.

Despite all this, “we can’t afford to be discouraged.” Family landowners should think creatively, engage stakeholder groups, seek more public-private partnerships, and reach out more to the public. The Committee for Family Forestlands is advisory only, but the Board of Forestry has accepted much of its advice.

General session II: Strategies to Sustain Family Forestlands

Gary Springer, forestland owner (moderator)

Clint Bentz, family forestland owner and CPA specializing in family-owned forestlands

Brent Davies, Ecotrust

Martin Goebel, Sustainable Northwest

Gary Springer

Introductions of panelists

Clint Bentz, family forestland owner and CPA

“Preserving our Ties to the Land: Keeping Forestland in Family Ownership”

In thinking through their succession options, landowners may consider selling their land, dividing it among their heirs, or leaving it to only one child. These are the simpler options, but all have drawbacks. Many owners would prefer a fourth option, leaving their

estate to all the children equally. This may seem the fairest and most logical choice, but it can be the most difficult to accomplish successfully.

Landowners should prepare by communicating their intentions to their heirs, teaching them how to run the business, and helping them learn to work together as partners. Most important, parents should communicate their passion and their vision for the land by emphasizing the intangible reasons for owning and managing forestland—the heritage value, the value of sustaining the family legacy, and the environmental and recreational benefits.

This planning should start as early as possible. The elder generation set up a financial and legal framework that helps children work together and discourages them from quitting or selling out. They should develop a governance structure that will survive the elders' passing and help the next generation address all the issues of business ownership, including issues of fairness.

Proper preparation will increase the capacity and desire in the next generation to carry on management of the family tree farm. If generational transfer is not handled well, family landowners risk losing their social license to practice forestry.

Brent Davies, Ecotrust

“Strategies of Conservation-based Forestry” (Powerpoint presentation available on OFRI web site.)

Since the last symposium, conservation-based strategies have emerged in Oregon to help sustain family forestlands. These include the Northwest Sustainable Timber Growers, whose members are FSC certified and who mill and market their logs in the United States. In addition, a carbon-credit market has emerged. Ecotrust Forests LLC is showing that active forest management can be both ecologically and economically feasible.

Martin Goebel, Sustainable Northwest

“Preserving Family Forests through New Market Opportunities”
(Powerpoint presentation available on OFRI web site.)

More resources exist today for sustaining family forestland owners than there were 15-20 years ago. Markets are emerging for small woodland owners to add value to their products, market them locally, and gain income from nontraditional products. Members of Sustainable Northwest's partnership Healthy Forests, Healthy Communities are seeking market-driven solutions for restoring forests and community vitality, and other non-profit groups are working toward the same goal. Active restorative forestry is becoming more socially acceptable. Such reinvestment in the land helps retain forest as forest.

Question from Rick Sohn about herbicides: Can we restore forests without them, and if not, are they a hindrance to social acceptability?

Answer from Martin Goebel: Herbicides do pose an acceptability problem. Sustainable Northwest does not have an opinion on herbicide use, but it does advise landowners of the potential problems.

Answer from Brent Davies, Ecotrust: Certification through Forest Stewardship Council (FSC) does not preclude all herbicide use.

General session III: Working and Gaining Support Within the Political Arena

Peter Daugherty, Director, Private Forests Program, Oregon Department of Forestry
(moderator)

Jim Brown, retired Oregon State Forester

David Ford, Metafore

Adam Davis, Davis, Hibbits & Midghall

Peter Daugherty

Introductions of panelists

Adam Davis, Davis, Hibbits & Midghall

“Public Communications” (Powerpoint presentation available on OFRI web site.)

To gain support in the political arena, forest landowners need to know two things: the values and beliefs held by the public and the level of public knowledge about forest management. Comparisons of results from recent polling with results from 2005 and 2002 surveys reveal certain trends, some encouraging, some not.

Regarding values and beliefs, recreation and aesthetics are the most highly valued attributes of forestland, and jobs are the least highly valued. The public is concerned about water and about a perceived lack of reforestation, and less concerned about conversion of forests to urban development and climate change. However, concern about conversion and climate change has increased since the 2005 survey.

Regarding knowledge, about half of respondents “strongly” or “mildly” approve of current forest management; about 20 percent answered “don’t know.” When asked whether they thought management of forests was appropriately balanced among all the potential values, there were about equal “yes” and “no” answers, but again, about 20 percent answered “don’t know.” Bear in mind that the “no” respondents include people at both ends of the opinion spectrum: those who think there is too much forest management and those who think there is not enough. The 2005 survey revealed that there were fewer people who knew about reforestation law and required buffers next to streams than there were in 2002.

Wildfire, a recent issue, elicits strong opinions. Most people support thinning to reduce fire risk or improve forest health (55 percent of respondents “strongly agree”). There is also strong support for using woody biomass for energy.

Some take-home messages from these surveys are:

- Public understanding of replanting and buffer requirements, which is critical to gaining public support for forestry, is waning.
- There is strong support for balance—equal emphasis on economic, ecological, and social objectives.
- People support thinning to reduce fire risk.
- Urban conversion is an emerging issue.
- Measure 37, which pits two core societal values against each other (private property rights and protection of forests and farmland), will be back in the public arena soon.
- Clearcutting is still a divisive issue. If people understand the biology of Douglas-fir regeneration, they tend to support it, but if they don’t understand, they tend to focus on aesthetics and on landslides.
- Woody biomass is supported as renewable energy.

Part of the surveying involved focus groups, which were asked, “What message do you have for private forest landowners?” A summary of answers:

- “Bend over backward. Go beyond what the law requires.”
- “Find out what the forest ‘wants to be’ and use minimal intervention to help it be that.”
- “Give up on the old growth.”
- “Look for alternatives to wood for raw material.”
- “Forests are important for both economics and recreation. Think about future needs, and be judicious in harvesting.”
- “Planted forests are all of one type and prone to disease. Diversify.”
- “Take the chains off the roads and let them be used.”
- “Protect the land. There has to be a balance between preservation and profit. [Nobody can] afford to [own forestland] and just look at it.”
- “Be responsible. We’re sitting on wooden chairs [i.e., we’re all consumers of wood]. Tell us the good things you’re doing.”

David Ford, Metafore
“Building Coalitions”

If Oregon’s leaders want a forest products industry, they must look at how products and services are manufactured and delivered. Metafore’s objective is to help businesses follow the logic of sustainability throughout the life cycle of the products they buy and make their purchasing choices accordingly. Sustainability decisions must account for all

aspects of the “supply chain,” including how a product is manufactured, shipped, stored, used, and disposed of.

Larger businesses are paying attention to social demands and are trying to be “greener” in their operations—trying to “turn green into black.” They can have considerable influence the market. For example, Time Inc.’s decision to buy certified paper led them to become involved with Maine’s forest-owner community. As a result, much Maine forestland is being brought under certification to meet Time Inc.’s purchasing objectives. Home Depot, Nike, and Starbucks are all thinking along similar lines.

Forest products manufacturing is important to Oregon’s future and the sustainability of its forests. Political leaders must convene the conversation about how to make it profitable and ecologically sound.

Jim Brown, retired Oregon State Forester
“Shifting Context”

The current context of family forestland ownership is marked by these developments:

- A shift toward an urban population with little understanding of working landscapes
- Changes in industrial ownership forms, notably the shift from integrated forest-products companies to timber investment management organizations (TIMOs and real-estate investment trusts (REITs)
- Dwindling of state general-fund dollars to support natural resource agencies
- Legislative term limits, which have forced knowledgeable elected officials out and increased the power of unelected agency employees and lobbyists
- Increased reliance on computer models to make management decisions, rather than limiting their use to aiding and supporting human judgment
- The emergence of new conservation groups willing to move beyond the protection paradigm and embrace active management for conservation goals
- Regulations that have reached the limits of their effectiveness

Most of these trends will continue. State agencies are not likely to receive higher funding, cities and suburbs will keep growing, timberlands held for investment purposes are likely to be bought and sold faster than those held for resource-supply purposes, protecting public values on forestlands will become more important and more contentious, and regulations will be ineffective in meeting public expectations. Nontraditional conservation groups could be helpful in meeting these challenges, but those focused on preservation will not.

The key issue faced by the Board and the Department is: Does this state want a viable forest industry in the future? If the answer is yes, then policymakers should negotiate a discussion aimed at forging a new social contract with rural Oregon. This discussion should:

- Help the public understand what is at stake and why they should care
- Work with interested parties to develop new tools to keep strategic lands as forest
- Visit with community leaders and develop political capital
- Cultivate working relationships with new conservation groups and landowners who “get it”

Oregon is changing, as it always has. Natural change is never-ending, and human activity influences it. Conservation is about managing the rate of change.

General session IV: Moving Forward

Diane Snyder, U.S. Endowment for Forestry and Communities and Oregon Board of Forestry member (moderator)

Brenda Woodard, family forestland owner

Chris Heffernan, family forestland owner and Oregon Board of Forestry member

Rick Sohn, Oregon Forest Industries Council and Lone Rock Timber

Russ Hoeflich, The Nature Conservancy

Rick Sohn, Oregon Forest Industries Council and Lone Rock Timber
“The viewpoint of industrial forest landowners”

The Oregon Forest Industries Council represents industrial private forestland owners, most of which, in Oregon at least, have similar interests and concerns as non-industrial private forestland owners—there is only one C corporation (Weyerhaeuser) among them. A few are TIMOs (Plum Creek, Campbell Group, Forest Capital Partners), and the rest are family businesses, some with multiple generations of ownership, such as: Guistina, Starker, Perpetua, Lone Rock, Indian Hill, Seneca, Swanson, Hampton, Miami, Whipple, Rosboro, Roseburg Forest Products, Port Blakely, and many others.

Industrial forestland owners face five survival issues:

- **Forestland owners need to transmit their family values down through the generations.** The heart of Oregon’s forest industry comes from the commitment that is created by those values, a commitment that leads forest owners to do whatever they need to do to hold their land in the family. Family values also enable industrial landowners to reach out to neighbors and act in unity with other natural-resource constituencies, notably non-industrial private landowners.
- **Forestland owners need knowledge** of forests, technologies, and research. It is important that natural-resource producers support the OSU College of Forestry, not only through the harvest tax but through gifts and bequests.
- **Forestland owners need markets for their logs.** Private forestland owners, both industrial and non-industrial, need to promote more harvest from federal lands. An increased, steady log supply will attract manufacturing capacity and open markets for private logs. Having more mills near Oregon’s forests will reduce transportation costs for landowners and increase competitiveness.

- **Forestland owners face a global marketplace.** Landowners will need to work strenuously to stay competitive in the face of global competition. Landowners need access to the full range of management tools—fire, herbicides—and they need to take advantage of certification systems that recognize responsible use of these tools.
- **Forestland owners need more political clout.** A better negotiating position will enable landowners to effectively say “no” to ill-considered new regulations and help create a stable regulatory environment. Regulations that decrease land value should be matched with compensation to the landowners. Laws that require keeping forestland in forest, without offering any other options, erode the owner’s bargaining position.

No other General Session IV presenters furnished written material, but moderator **Diane Snyder** collected pithy quotations from speakers throughout the symposium. Here they are:

“Sustainability is surviving and adapting to a changing world.” **Hal Salwasser**

“The health of family forestlands is important to every single person in Oregon, and they don’t know it.” **Steve Hobbs**

“Pessimism is a primary source of passivity. We can’t afford to be discouraged.” **Ron Cease**

“Everybody wants to go to heaven, but nobody wants to die.” **Clint Bentz**

“Manage for multiple products and services ... get involved.” **Brent Davies**

“Our greatest challenge is to connect urban and rural communities.” **Martin Goebel**

“Oregonians want balance.” **Adam Davis**

“Oregon leaders need to decide if they want a forest industry.” **David Ford**

“Forest fragmentation involves issues that provide the ‘hook’ that will allow the public conversation.” **Jim Brown**

“Change: help steer it, not stop it.” **Brenda Woodard**

“We’re all here for hope, and truly, there is strength in numbers.” **Chris Heffernan**

“The number-one survival issue for family forestland owners is passing on family values.” **Rick Sohn**

Looking Forward II
Oregon Families & Their Forestlands: Proceedings of a Symposium
April 27-28, 2007
Oregon State University

“Together we can identify needs, and together we’ll find the solutions.” **Russ Hoeflich**

“Margaret Mead once said, ‘Never doubt that a small group of dedicated people can change the world. Indeed, it is the only thing that ever has.’” **Diane Snyder**

Closing Remarks

John Bliss
Starker Chair for Family Forests,
College of Forestry, OSU

Viviane's assignment could not be clearer: "Deliver a profoundly moving benediction. No more than five minutes." I will endeavor to learn from Voltaire, or some such important dead white guy I should have read but haven't, who said, "Pardon me for the length of this letter, but I hadn't time to write a shorter one."

Sometimes, at gatherings like this, you can hear, from some distance, a fine Oregon whine. "Nobody appreciates us!" "They all want something for nothing!" "They need to be educated!" Or, "They're gonna regulate us to death!" And "We can't compete with the big guys!" Rodney Dangerfield would feel right at home with us.

I don't mean to minimize the seriousness of these issues; they're real, and they're enough to turn anyone into a pessimist. But no pessimist ever planted a tree. Maybe we should close this symposium by considering some of the positive attributes, the strengths, the advantages of family forestry: advantages to family forest owners, to be sure, but also advantages to our society. Here are three:

1. Family forests have something no other ownerships have: family forest owners. Because you are diverse in your objectives and capacities, your forests are diverse. For decades foresters have tried, and failed, to get you all to follow the industrial model. Thank goodness! You are knowledgeable, capable, passionate, and multiple-value-driven. You are connected to special places. You are citizens who care about local communities. How many corporate forest owners display these qualities?
2. Family forestry is human-scale forestry. It's characterized by small-scale ownerships and management units, long-term goals and objectives. It's flexible, innovative, experimental—and fun! (How much fun is corporate forestry?) These are all attributes that earn family forests greater social acceptability than either corporate or public forest ownerships.
3. Family forestlands produce what our society wants. Clean water and air. Wildlife habitat. Healthy, diverse, beautiful landscapes. Recreational opportunities. Products grown and harvested with care for the land. Vital rural communities.

But realizing the potential benefits of family forestry involves meeting several challenges:

1. Economies of scale are a reality. Especially in commodity markets, small-scale owners are at a disadvantage. Competing in tough markets, and creating new

Looking Forward II
Oregon Families & Their Forestlands: Proceedings of a Symposium
April 27-28, 2007
Oregon State University

- markets, may require cooperation and collaboration. And who got into forestry to collaborate?
2. Markets for many of the goods and services family forest owners produce—ecological services, carbon sequestration, habitat mitigation, certified forest products, special forest products, and recreation—are immature. Innovators and early adopters often find themselves on the “bleeding edge.”
 3. Fear of change, mistrust of others (urbanites, enviros, and Californians, for Pete’s sake!), and a “circle the wagons” mentality will prevent many family forest owners from participating in emerging opportunities.

Yesterday Ron Cease quoted Barbara Tuchmann: “Pessimism is a primary source of passivity.” To this I might add, “Optimism opens opportunity.” It is easy to despair about the difficulties of making it as a family forest owner in a global market. The challenges seem overwhelming and the solutions too complex, too long in the making, or too unlikely to materialize. But I know you are, at heart, optimists, because you plant trees. May your optimism open opportunities for you, for your families, and for the society to which we all belong.

Appendices

Appendix A. The white paper (review of regional roundtables)

**Committee for Family Forestlands
Regional Roundtable Review
For
Looking Forward II:
Oregon Families & Their Forestlands: What's at Stake
April 27-28, 2007**

INTRODUCTION

In early 2007, the Committee for Family Forestlands posed a series of questions to family forestland owners and other interested people throughout Oregon. The questions were intended to stimulate discussion about the challenges facing family forestland owners.

This paper summarizes the responses to those questions. Feedback was wide-ranging and varied, thoughtful and challenging.

The most immediate application of this roundtable review is to guide the committee as they prepare for the April 27-28 Symposium, "Looking Forward II, Oregon Families and Their Forestlands: What's at Stake."

It is also hoped that this review will focus the thoughts of the Symposium's participants, invite them to engage these challenges creatively, and inspire them to take ongoing effective action.

BACKGROUND

The nine-member Committee for Family Forestlands, constituted in 2000, advises the Oregon Board of Forestry on topics of concern to non-industrial private owners of forest lands, who collectively own about 16 percent of the forestland in Oregon.

In preparation for the April Symposium, the Committee sponsored five regional roundtable discussions at locations throughout Oregon. A total of 73 people attended—20 in Portland, 22 in Eugene, 10 in LaGrande, 6 in John Day, and 15 in Bend. About two-thirds of the attendees were family forestland owners; others were publicly and privately employed foresters and land managers, local elected officials, and other interested persons.

Roundtable participants were asked to consider these questions:

- How long have you been a family forestland owner? What changes have you experienced in your life as a family forestland owner?

- What words or phrases would you use to describe your relationship to your forest land?
- What concerns about forestry and your lands keep you awake at night?
- What will be the biggest issues or problems facing family forestland owners in the next 5-10 years? The next 10-30 years?
- What are some things that have worked for you in addressing past problems?
- What social, environmental, and economic benefits does your forest land provide to you and your family? To your community?
- If you had 30 seconds to broadcast a message to the people of Oregon about family forestlands, what would it be?

Along with responses from roundtable participants, this summary also includes separately submitted remarks from about a dozen people who were unable to attend a roundtable. Also included is feedback from a number of family forestland owners in Coos and Lincoln counties, arising from brief group discussions conducted by the Oregon Small Woodlands Association.

This summary first presents the key issues that emerged from the discussions—the challenges participants reported in managing and maintaining their forest lands. Then we list the solutions suggested by participants—measures they had taken that produced positive results for them.

ISSUES

The key issues that emerged from the discussions seemed to fall into 10 broad headings; the final two issues were of particular concern to the east-side participants. The issues are listed here in no particular order. Each issue heading is followed by a summary of the perceptions of participants about the nature of the issue and its causes and implications.

The reader should keep in mind that these summaries are statements of participants' thoughts, feelings, and opinions about the issue in question, and not necessarily facts.

Issue 1. A conflict of values exists both within the forest owner community and between forest owners and their non-forest-owning neighbors.

Summary of perceptions:

People who own forests for income have a different set of values than those who own forests for amenity purposes. Many owners are absentee, especially on the east side. Non-forest-owning neighbors and people in adjacent communities often do not understand or tolerate forestry practices. An increasingly urbanized society does not appreciate that extracting timber is necessary to produce the wood

products society needs and wants. The right to practice forestry on one's own land is at risk.

Selected comments:

“People's values are all over the board in Lane County.” (Eugene)

“The county tells me areas are zoned forestry, but houses are popping up everywhere. Will I be restricted from spraying or having friends over to hunt deer?” (Eugene)

“The public lacks respect for what we do. Let them live without wood for a day.” (Coos County)

“Private landowners receive solicitations in the mail—‘we'll give you cash to take your land headaches off your hands’—and then you have a whole new set of landowners who are not educated in forest management, and they are less likely to manage.” (Bend)

“[We have a] new class of forest owners such as the Deschutes Basin Land Trust. ... Can the land be managed sustainably?” (Bend)

“There is a lack of appreciation about where we get the natural resources we use [and] an increasing disconnect between those who use the resources and those who produce resources... Tied to that is urbanization. People who produce and use are [living] side-by-side right now.” (Portland)

“The new urban view of ‘trees as sacred’ affects new forestland owners; they don't manage their forest and have no intention of managing it.” (Bend)

“Public perception is not always the best for management practices. ... Does the majority of NIPF owners understand the issues?” (John Day)

“We need some kind of agreement that when folks buy a tract of land, they won't interfere with nearby [forest] management activities...we need right-to-forestry regulations.” (Portland)

Issue 2. The regulatory environment is unstable, and rules are often inflexible and complicated.

Summary of perceptions:

Regulations can be hard to interpret and too broadly prescriptive. Regulations change. There is not enough consideration in recognizing local knowledge and decisions. Regulations may not accomplish policy objectives. Sometimes the rules are not enforced. Taxes, especially property tax and inheritance tax, discourage long-term stewardship.

Selected comments:

“There needs to be flexibility of regulations to allow for creative management of timberlands. ... There is no better way to screw up than to have everyone doing the same thing.” (Portland)

“You plant all these trees and then the regulations change. [There] must be a way to stabilize what we use from science, allow for process change and still keep [owning forestlands] attractive for the next generation. We can’t have [the rules] so complex that they (next generation) walk away from it.” (Portland)

“[I’m concerned about] blanket applications of regulations, especially stream designations.” (Eugene)

“There are so many rules, regulations, guidelines, and suggestions, it’s hard to reconcile them in actual practice and afford to do them.” (Lincoln County)

“With property values rising at the present rate and the inheritance tax what it is, it will make keeping the family farm very difficult...” (e-mail response)

Issue 3. The pathway of succession from one generation to the next is fraught with pitfalls.

Summary of perceptions:

Children of family forestland owners are often not available, interested, or skilled enough to take over ownership. It is hard to treat children fairly when some are involved in the family land and others are not. Family dynamics surrounding the inheritance of valuable property are difficult for many families, with high potential for hurt feelings or estrangements. There may be no heirs-apparent in the family. It is hard to know which legal and financial arrangements will be best.

Selected comments:

“We have three different ownerships and, out of all the kids, no one has shown suitable interest in managing these lands.” (Eugene)

“If you don’t get that next generation hooked, you go through the cycle we’ve seen...the next generation sees all this money. They whack it (the trees) and don’t replant. Must have the kids live on the land and understand that they may not see the harvest.” (Portland)

“My family has strong feelings ... a heritage. But if someone offers ... big dollars, should we sell?” (Eugene)

“Years from now, when the good stewardship of the last 15-20 years starts to pay off, it won’t be a problem. But between now and then, it’s going to be hard.” (Lincoln County)

“After the third generation [transfer] is a big issue. Land tends to be sold due to short-sightedness.” (LaGrande)

“Even though the land has been turned over to the kids on paper, Dad still is the official manager and can do whatever he wants.” (e-mail response)

Issue 4. Forestry at the family-woodlands scale is not very rewarding financially.

Summary of perceptions

While the intangible rewards of forest ownership are considerable, hard work often goes unpaid. Timber is an intermittent crop with cash-flow challenges. Family forestland owners cannot compete very well against industrial timber companies because their operating costs are higher and their output lower. Market pressures favor short rotations, which reduce the complexity of forest structure—historically one of the distinctive landscape contributions of family-owned forests. Increasing emphasis on short-rotation forestry also threatens to lower forest productivity over time. A globalizing economy has reduced processing infrastructure and impoverished local timber markets, especially on the east side. The challenge of managing for multiple values is getting harder, also especially on the east side.

Selected comments:

“What can we do to make the returns work, so that I can encourage, in good conscience, my kids to do forestry?” (Portland)

“I’m concerned about ... lumber coming in from Canada and other places. How do we have a market with our restrictions and [with] mills only taking certain sizes of timber?” (Eugene)

“What’s worked for us is trying to produce some of our own food. ... We have an orchard [and] a garden and are a little bit self-sufficient. We have the woodland as a lifestyle ... This seems to be a trend.” (Eugene)

“High-tech mills have the effect of condensing our markets and the tree species we grow for profit, but the public wants us to grow in a different way.” (Coos County)

“The biggest issue facing our family is the necessary cash flow to do what has to be done and make it financial realistic ... to manage the land.” (Lincoln County)

“The industrial forest owners have bet on...high volume, low quality (timber). They can make that work because they have large acreage. But simplifying milling capacity isn’t working for us.” (Portland)

“I’m lucky because I have outside income ... without that, our family ranch would be hard-pressed to provide sufficient income year in and year out.” (Lincoln County)

“The current ‘return-on-investment’ industrial commodity model of forestry is NOT sustainable or what Oregon and the world need ...” (e-mail response)

“Loss of mills is a huge problem.” (Bend)

“I worry about haul distances, loss of infrastructure, increasing management costs, and decreasing log values. Harvests have to be economically feasible.” (John Day)

“Part of the value of wood issue is we’re competing with countries not worried about environmental issues. It would be helpful to have some control over imports...especially dimensional lumber.” (Portland)

Issue 5. The public expects unpaid services from family forestlands.

Summary of perceptions:

Family forests provide ecosystem and amenity services such as water filtration, wildlife habitat, and attractive green space around cities, but public pressures can discourage the profitable management required to keep these services going. Society seems to be placing a disproportionate burden on family forestland to keep water quality high and provide wildlife habitat. Forestland owners manage according to stricter environmental standards than farmers, but they receive little social approval for it. Family forestlands are inviting places to walk, hunt, and fish, but people sometimes use them without permission, and family forest owners must deal with trespass, vandalism, and garbage dumping. Landowners risk being sued by people injured on their land.

Selected comments:

“We need an easier way of controlling invader traffic on our land. There’s always ATV trespass and fire and unwatched visitors on public land.” (Portland)

“The social costs of environmental benefits are being borne by landowners, not the people in towns and cities who also benefit.” (Bend)

“The issue for landowners is the litigiousness of society. We need hold-harmless agreements. Someone can choose to sue you.” (Portland)

Issue 6. The changing land-use environment in Oregon is a source of uncertainty and disagreement.

Summary of perceptions:

Suburban development fueled by population growth and in-migration is gobbling farmland and forestland around urban areas, particularly on the east side. Measure 37 (the 2004 initiative that loosened certain land-development restrictions) is perceived by some forest owners as restoring their property rights, and by others as opening their land to encroaching development. Family forestland is threatened on one side by suburban growth and on the other by competitive pressures. The likelihood is high for family forestlands to be converted to either housing or industrial forestlands.

Selected comments:

“If you look at Portland metro population projections, we’re adding another 1 million people ... Where do you think the urban growth boundary is going to go?” (Portland)

“[I’m concerned about] continued consolidation and fewer small woodland owners over time.” (Lincoln County)

“Development is encroaching on us ... People are building homes in the forest and ... they want to put their roads in the riparian areas we have worked hard to improve.” (Bend)

“The times they are a-changin’. We need to break down the current paradigms.” (LaGrande)

“With the price of land today [as compared to timber], we’re all out of business.” (Portland)

“If FFL owners are faced with pressures from higher taxes and increased bare-land values due to development pressure, they are forced to sell. The loss of timberland to development needs to stop.” (e-mail response)

Issue 7. Family forestland owners do not have a strong political voice.

Summary of perceptions:

Family landowners have a distinctive set of interests and concerns—they are different from industrial operators and different from the general, and in particular urban, public—but because of their small numbers and lack of financial clout, they have little influence over forestry laws and policies.

Selected comments:

“We lack major clout. The Portland and Eugene areas are dominated by folks who don’t have the interests we do. The Legislature is moving more left.” (Eugene)

“There are only 10 million woodland owners among the 275 million citizens that Congress represents. It’s difficult to get the attention that is deserved.” (e-mail response)

Issue 8. Global climate change poses ecological threats, but also potential economic opportunities.

Summary of perceptions:

A warming climate will cause unpredictable changes in the ecological function of forests and in the financial climate in which they operate. Forestland owners may be able to profit from managing forests for carbon mitigation. Using wood as biofuel may open opportunities for forest owners, but may also strip forests of needed nutrients.

Selected comments:

“Even the most conservative predictions are frightening.” (Portland)

“What will bioenergy do to forestlands? Take all the fiber off the land and not replace nutrients?” (Portland)

“There is a pot of money to be made in growing trees and getting credit for it.” (Eugene)

“If we start to buy and sell carbon credits, do we (FFLOs) get to help establish the rules of that market?” (Portland)

Issue 9. Federal lands are not being managed well, and yet their fate affects the fate of neighboring private lands.

Summary of perceptions:

Federal lands are “the elephant in the living room”—what happens on federal lands greatly affects the fate of neighboring private forestlands. Increasing risk of wildfire, insect infestations, and invasive species on federal lands threatens adjacent private lands. Federal lands should be managed more actively, and federal managers need to be more engaged with their neighbors.

Selected comments:

“Urban interface and fire is a big issue. Non-forest management in national forests will create real devastation.” (Eugene)

“What is ‘natural’ forestland? With fire being kept out of the system, what we currently have may not be natural.” (Bend)

Issue 10. Forestry laws and policies are biased toward west-side concerns.

Summary of perceptions:

East-side landowners feel unsupported in coping with their particular management challenges, such as slash burning, fuel buildup, fire risk, stocking, water supply, managing for other revenue sources such as fee hunting.

Selected comments:

“The Forest Practices Act is designed by and for the west side. The east side has different issues.” (Bend)

“[Issues that keep me awake at night are] understanding fuels and how they respond to different management practices.” (LaGrande)

“Risk of loss prior to harvest [because of a] huge fire.” (LaGrande)

“Water—maintaining adequate supplies; ponds, canopy cover, other storage systems, distribution across the landscape.” (LaGrande)

PROPOSED SOLUTIONS

To the question “What are some things that have worked for you?” participants generated a variety of ideas to address the various issues that were raised. These potential solutions seemed to group themselves into four general arenas:

- individual action,
- political efforts,
- financial strategies, and
- educational and cultural outreach.

Selected solutions are presented below, in the hope that they will generate many more creative solutions at the Symposium.

Issue 1. Bringing values closer together

“Producing and distributing educational materials within my small woodland organization.” (Educational and cultural)

“Reaching out to neighbors and letting them know what I do” (Individual action; educational and cultural)

“Bringing kids out to tree farms and on tours and interpretive trails” (Individual action; educational and cultural outreach)

“Engage the media by writing editorials and participating in interviews and commercials” (Individual action; Educational and cultural outreach)

“Telling the ‘forestry story’ at local schools” (Individual action; Educational and cultural outreach)

“Going to meetings of conservation and environmental organizations” (Individual action: Educational and cultural outreach)

“Meeting with my legislators” (Individual action; Political efforts)

Issue 3. Successful succession

“Engaging and mentoring the next generation while they’re young” (Individual action)

“Identifying everyone’s skill and find a way for all to participate” (Individual action)

“Being willing to turn over the reins” (Individual action)

“Doing my financial homework” (Financial strategies)

“Telling my family’s story through my forestland” (Individual action)

“Engaging my spouse to be more involved and have ownership” (Individual action)

“Put part of forestland into Family Limited Partnerships to involve family members” (Individual action; Financial strategies)

Issue 4. Making management more profitable

“Develop better, higher-value markets for our wood” (Individual action, Political efforts, Financial strategies, Educational and cultural outreach)

“Keeping abreast of the latest education and technology” (Individual action)

“Engaging with local and state lawmakers—being your own lobbyist” (Political efforts)

“Actively participating in forestry organizations” (Individual action, Political efforts, Educational and cultural outreach)

“Recycling forest material and marketing nontraditional forest products” (Financial strategies)

“Having a management plan” (Individual action; Financial strategies)

Issue 6. Promoting fair and responsible land use

“Organizing to oppose Measure 64” (Political efforts)

“Cultivating the press” (Educational and cultural outreach)

Appendix B. Results of breakout-group discussions—the long form

First poster: 5 votes

Issue #2. The regulatory environment is unstable and rules are often inflexible and complicated

Solution: FFO education regarding forest practices that creates opportunities for dialogue

1. ODF and Extension develop a Forest Practice Short Course. Curriculum would include
 - Forest Practice rulemaking process
 - Background and intent of each forest practice
 - How to write written plans for alternate practices
 - Field trips
2. Update Bob Logan's Forest Practice Book with changing forest practices.
3. Provide funding for more stewardship foresters.

Second poster: 9 votes

Issue #6. Changing land use in Oregon is source of uncertainty and disagreement. Our best idea for resolving this issue: We framed our best idea as going back to the roots of the first attempt to resolve land use uncertainty—Senate Bill 100, 1972, whose original intent was not fully translated into the bill produced, given time constraints of the Legislature in writing the book. Some parts of SB 100 have not been fully implemented; e.g., land allocation, economic goals. We suggest revisiting SB 100 and use its principles as a framework (not reinvent the wheel) to reflect present realities and changing demographics, and create a revised public policy and remove uncertainty.

Third poster: 8 votes

Issue #5. The public expects unpaid services and amenities from family forestlands. Our best idea for resolving: Initiate dialogue among FFLs and public regarding opportunities for local mutual benefits. Develop the local economy of environmental services. Mechanisms: Tree School, media (OFRI, others), watershed councils, The Nature Conservancy, TPL. [Viewer invited to add ideas for mechanisms.]

Issue #1. Conflict of values [heading over all three of following posters]

Fourth poster 32 votes

Educating family forest landowners

Objective: Develop informed, motivated, and involved family forest landowners who can communicate effectively with wider community.

Develop partnerships and identify leaders in NGOs to assist in training, creating cohesive interests, new funding sources, and communication/education materials.

Currently managing property: increase capacity to work with elected officials local and state levels and with state and other regulatory agencies.

Nonmanagers/nonmembers: increase knowledge of value of managing forests.

Drive education of larger community

- neighbors
- policy/decision makers
- general public

Fifth poster: 11 votes

Tying family forestry knots

- marketing effort to Oregon urban recreationists
- web-based “Oregon Roadside Family Forestry” program
- interpretive signs for family forestlands, such as “Century Farm” and “When planted”
- connect with tourism—look for commonalities

Sixth poster: 35 votes

Local lumber for local projects

- Tree farmers’ markets
- “My neighbor grew the lumber for my house”
- “Oregon Field Guide” episode

Seventh poster: 27 votes

Assuring viability of family forestlands

Establish a green credit forest fund to provide annual payment for conservation easements on family forestlands that provide public benefit. Avenues to establish the fund could include conservation nonprofits and/or government agencies and existing mitigation funds. Funding would come from development charges or green payment from consumers.

Eighth poster: 44 votes

Issue: conflict of values

Solutions:

- More intensive public education is needed, such as is done by the sponsors of this symposium and public educators
- sponsor and support family forestland tours for the public and for schoolchildren
- Make an effort to outreach to new rural property owners to explain the management and values of the forestland.
- promote opportunities for older children to visit and work on tree farms.

Ninth poster: 44 votes

Embrace new tools for new times.

Global climate change is an opportunity for family forestland owners:

- to demonstrate how management practices align with societal values
- to create job and business opportunities that improve economic conditions and the environment
- to stimulate synergy between environmental groups, growers, manufacturers, and consumers.
- to reconnect urban and rural Oregonians through the marketplace.

Tenth poster: 63 votes

Family forestland owners are burdened by societal expectations without compensation.

Solution: For '09 legislative session, Board of Forestry and FFLC must create and advocate for state and federal incentive legislation including:

- carbon credit program that is mandatory for polluters and voluntary for family forestland owners
- in family succession, exempt standing timber value from value of the estate
- financial incentives for maintenance of buffers for water, fish, wildlife, ESA, etc.
- “hold harmless” on liability for trespassers on private FFOs’ properties

Eleventh poster: 16 votes

Family forestland owners must communicate our common vision to the public

Solution: Within two years, the Board of Forestry and FFLC should strengthen public education from FFLO point of view via:

- OFRI/OSWA create a “Got Forests?” campaign to show importance of FFLOs’ contribution to health of Oregonians
- Increase funding to promote education via
 - % of general fund toward Natural Resource Fund
 - harvest tax increase to support public education
 - statewide fire tax

Twelfth poster: 54 votes

Keeping family forest in family forest: tools for profitability, conservation, collaboration

- financial incentives
- conservation easements
- get money for sale of development rights, fishing and hunting rights, water rights, recreational rights, carbon rights
- market enhancement
- transfer liability to state in exchange for access
- education of public and urbanites
- access to science and technical assistance
- improve land use planning: increase private flexibility, retain public value

Thirteenth poster

Issue: conflict of values

Actions to build common understanding and perception

Use tiered approach:

- Adopt a classroom (OSWA chapters)
- Volunteer, “Adopt a site” (convene a community conversation)
- On-site visits (conservation, 2-way dialogue to build understanding)

Auto tours with CD (OFRI)

Media messages (Interviews with landowners, podcasts, virtual visit, YouTube video)

Fourteenth poster: 22 votes

Our big idea:

Reach a number of top-priority goals by creating a multi-level set of performance standards to enhance current single-level forest practices act. Focus on on-the-ground performance. How it might work:

[Table]

Levels—standard (buffers, carbon)—policy incentive—market incentive

Top = highest level of ecological value

Medium= EG basis management plan

Base I = current Oregon forest practices act.

This helps:

The public (consumers) have more reason to be supportive and option of choice

The family forest owner—way to encourage high standards of operation—also way to remove current barriers and increase productive value of forest

Agencies and public—mechanism to maintain and build public values.

Businesses—means to better respond to market demands.

Linked to PR effort focused on communicating the above and value of FFL in public.

Fifteenth poster: 11 votes

Education for values

Expand programs which educate how woodlands provide Oregonians with daily necessities and benefit their quality of life (EG OFRI, SWA, Extension)

Sixteenth poster: 18 votes

Intergenerational

Develop workshops to help small woodland owners create and communicate:

—clear written vision and value statements

—management plans: use cross-disciplinary team that accesses existing technology and existing landscape mgmt plans to develop an accessible management plan process for SWOs

—estate-succession plans: develop partnerships to train facilitators to deliver Ties to Land program for SWOs

Seventeenth poster: 10 votes

Succession Action Items

—More funding for k-12 education in resource and forest management

—Develop and conduct “succession training” (per the Japanese model)

—Expand “Ties to the Land”

—Think about intergenerational succession both within and outside the current family owner

- E.g., a successor vs. an heir: who has the “passion”?
 - Investigate existing options and models that assist in the transfer of valuable businesses/properties/forests
 - Develop a system that would work with forest lands
 - Collect stories of things that have worked
 - Share through database
 - Share through meetings
 - Share through publications
- Help FFOs be informed of the value of their timber and land
 - The total value can affect estate planning and option selection
 - Who could do this?
 - Perhaps OSWA should take the lead
 - Outreach – not all OR FFOs live in OR
- Support WOWnet as a way to help women gain forestry knowledge and skills and confidence and therefore participate in successful succession
- Support legislative/lobbying efforts to stabilize the regulatory and taxation environment.

Eighteenth poster: 59 votes

Provide financial incentives to reward family forestland owners for voluntary conservation practices that exceed forest practices regulations

Use renewable stewardship and/or conservation agreements to gain access to:

—reduce state inheritance tax liabilities

—state and federal income tax credits

—protection from liability (“hold harmless”) to encourage access of public to family forest lands

—ability to sell tax credits

—accessibility to cost-share dollars for ecosystem improvements

—have payments for carbon sequestration linked to these agreements

Nineteenth poster: 40 votes

New issue: the delivery mechanism for influencing stewardship and sustainability is not effective for either participating or non-participating groups & individuals

Solutions:

—education/message content with specific audiences needing specific messages

—we must form new coalitions.

Examples: Intergenerational succession requires a two-way intergen values transfer

Action: train all foresters who interact with SWOs to engage in dialogue about Ties to Land

Action: Identify opportunities to engage SWOs who are not engaged, around Ties to Land

Action: Use family values to build grassroots support

Action: Build new public/private/corporate/industry coalitions

Twentieth poster: 20 dots

Issue: Resolving values conflicts and regulatory funding uncertainty requires new approaches to retain forest land as forest

- Action: Two-way compensation system for mitigation/development
 - Action: Opportunities to transfer land from family to family
 - Action: Promote social respect and “neighborhoodness”
 - Action: Federal forest funding for countries
 - Healthy forests = sustainable communities
 - Action: Build certainty into regulatory changes
- Example: Increase federal mgmt. options on federal forests
- Action: Focus on participating stakeholders at the local level
 - Action: Require bonding to file forest plan appeals

Appendix C. The symposium agenda

AGENDA

Friday, April 27, 2007

8:00 Registration/refreshments

9:00 Welcome and Conference Overview

- Anna Starker May, 4th generation landowner
- Justin Heffernan, 2nd generation landowner

9:20 Icebreaker, Overview of Process

- Viviane Simon-Brown, Extension Forester, Oregon State University

9:30 **General Session I: The Context**

- Tom Nygren, moderator, family forest landowner, *Facing the Future: What's at Stake?*
- Hal Salwasser, dean, College of Forestry, Oregon State University, *Global, National and Regional Trends*
- Steve Hobbs, chair, Board of Forestry and Ron Cease, chair, Committee for Family Forest Lands chair, *Public Policy Implications*

10:45 Break

11:15 **Breakout Session I:**

Facilitated small group work about concerns identified at regional roundtables

12:30 **Lunch**

1:30 **General Session II: Strategies to Sustain Family Forestlands**

- Gary Springer, forestland owner, moderator
- Clint Bentz, forestland owner, *Preserving our Ties to the Land: Keeping Forestland in Family Ownership*
- Brent Davies, Ecotrust, *Strategies of Conservation-based Forestry*
- Martin Goebel, Sustainable Northwest, *Preserving Family Forests Through New Market Opportunities*

2:45 Break

3:15 **Breakout Session II:**

Continue small group work on family forestland issues

4:45 Reception

Looking Forward II
Oregon Families & Their Forestlands: Proceedings of a Symposium
April 27-28, 2007
Oregon State University

6:00 Optional Workshop: *Ties to the Land*
- Clint Bentz, Boldt, Carlisle and Smith CPAs

Saturday, April 28

7:30 Refreshments

8:00 Welcome back, agenda review
- Mike Cloughesy, Oregon Forest Resources Institute

8:15 **General Session III: Working and Gaining Support within the Political Arena**
- Jim Brown, retired State Forester, *Shifting Context*
- David Ford, Metafore, *Building Coalitions*
- Adam Davis, Davis, Hibbitts & Midghall, *Public Communications*

9:15 **Break**

9:45 **Breakout Session III:**
Each group identifies/develops best ideas to share with other groups and prepares materials.

11:30 Walkabout and Vote
Groups display their top recommendation. A representative from each group answers questions. Viewers identify the most important actions to forward to the Board of Forestry and Committee for Family Forestlands

12:15 **Lunch**

1:15 **General Session IV: Moving Forward**
- Diane Snyder, U.S. Endowment for Forestry and Communities and Oregon Board of Forestry member (moderator)
- Brenda Woodard, landowner
- Chris Heffernan, Board of Forestry, landowner
- Rick Sohn, Oregon Forest Industries Council/ Lone Rock Timber
- Russ Hoeflich, The Nature Conservancy

2:30 Voting Results
- Mike Cloughesy, Oregon Forest Resources Institute

2:40 Closing
- John Bliss, Starker Chair for Family Forests, OSU Forest Resources Department