



THE PINCHOT LETTER

News from the Pinchot Institute for Conservation

Vol. 7, No. 2 Fall 2002

Ecosystem Restoration Workforce Workshop Raises Key Policy Issues

Ecosystem restoration is a diverse industry that incorporates a variety of tasks, often requiring specialized skills. Typical activities include reforestation, forest stand improvement, survey and monitoring, fuels reduction and fire suppression, and habitat restoration. In the past, the dynamics of this industry have been closely tied to natural resource extraction, but they have also become more subject to influences from public policies, concern over the risks of natural disaster, and societal values of maintaining functioning ecosystems.

On June 6, 2002, the Pinchot Institute convened a policy workshop for practitioners, researchers, and leaders in the field of community-based, ecosystem management to discuss the issues and research priorities imperative to developing the ecosystem restoration workforce. Through presentation and panels, the participants discussed the situation of the current workforce, the achievements of programs designed to aid it, and key research and policy priorities affecting the workforce.

Some significant trends affecting the face of the ecosystem restoration workforce were identified during the workshop. One is that most ecosystem management work is becoming more complex, demanding a higher level of skill than ever before. This includes the labor-intensive work of tree planting and thinning, which are in-

creasingly done under prescriptions that require workers to make decisions based upon species type and ecological microsite.

While the level of expertise involved in ecosystem restoration work increases, real wages have stayed the same or declined. In Oregon, for example, the forestry services employment sector did not keep pace with inflation during the period of 1990 to 1999¹. Combined, these trends depict an industry that is becoming more competitive while at the same time, more technically challenging.

Another significant workforce trend results from an ongoing drive to reduce federal government payrolls and shift more work on public lands to the private sector. During the period of 1992 to 1999, the USDA Forest Service reduced its permanent workforce from 35,301 to 28,194 workers with an even greater reduction in the percentage of its non-permanent workforce². With some notable exceptions, such as a planned increase in more than 4,000 permanent and non-permanent fire fighting personnel, this downsizing trend is expected to continue within the agency throughout the next decade.

As government agency numbers decline, there is a corresponding increase in the amount of land management work that will be carried out by the private sector through service

contracts. The way in which these contracts are designed and the bidding mechanism used will mean all the difference for workers and small ecosystem management contractors. Innovative projects, such as the Willamette Province Workforce Partnership in Oregon have demonstrated that, more than size, the structure of an ecosystem management contract is critical to building and sustaining workforce capacity over the long term. Lengthier contracts that incorporate different land management activities in the same area challenge workers to develop skills, keep people employed for longer periods of time, and enable workers to become more familiar with the landscape. These contracts, however, require time on

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Leadership in Forest Conservation Thought, Policy and Action



the part of the contracting officer to manage and, as the government gives fewer employees more contracting dollars to administer, incentive to make contracts larger and simpler.

Under the best value contracting system, the government is not confined to award all service contracts to the lowest bidder, and may evaluate a set of criteria in order to determine which bid would bring the greatest value to the government. This can be an effective tool to encourage innovative, high-quality restoration work, especially when the contractor's past

performance and experience are considered in the selection criteria.

Controversy over the use of best value has arisen, however, as a result of language in the National Fire Plan's 2001 and 2002 appropriations and Title II of the Secure Rural Schools and Community Self-Determination Act, which, among other provisions, enables federal land management agencies to consider a contractor's commitment to hiring local residents as a criterion in awarding best value contracts. This has been threatening language to organizers of

the mobile workforce, a group consisting predominantly of people of color, which has performed much of the labor-intensive tree planting, thinning, and fire fighting in the Pacific Northwest during the last couple of decades. According to Juan Mendoza, of Willamette Valley Reforestation, Inc., this interpretation of the best value contracting system is too narrow and excludes mobile forest workers, who often travel great distances to work in the forest, from accessing these contracts.

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ABOUT THE PINCHOT INSTITUTE

Recognized as a leader in forest conservation thought, policy and action, the Pinchot Institute for Conservation was dedicated in 1963 by President John F. Kennedy, Jr. at Grey Towers National Historic Landmark (Milford, PA)—home of conservation leader Gifford Pinchot. The Institute is an independent nonprofit organization that works collaboratively with all Americans nationwide—from federal and state policymakers to citizens in rural communities—to strengthen forest conservation by advancing sustainable forest management, developing conservation leaders, and providing science-based solutions to emerging natural resource issues. Further information about the Pinchot Institute's programs and activities can be found at www.pinchot.org.

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Proponents of this legislation, however, see it as an opportunity for communities bordering federal lands to capture some of the economic benefit typically snapped up by large, regionally based firms that can out-compete local business through economies of scale and low wage compensation. The problem is exacerbated by the government's difficulty in enforcing the Service Contract Act, which sets the minimum wages that companies with federal contracts must pay their workers for natural resource work.

Due to the lack of an adequate reporting mechanism, contractors are frequently not held accountable to pay these wages to workers. Furthermore, for crews that travel large distances, travel time and costs are frequently uncompensated. Reports from contractors reveal that land management agencies commonly

award service contracts for much lower than the estimated cost of doing the work and do not know what the workers on the job are eventually paid. Subsidizing restoration through cutting labor costs is hurting workers in mobile and rural communities alike.

The Pinchot Institute's June forum highlighted some areas of common ground where collaborative work between rural and mobile workers, government, nonprofits, and community colleges can focus on raising the standards of the ecosystem restoration industry for workers. One clear priority is increasing opportunities for training workers, especially on the job, so that they develop more capacity to meet the technical demands of today's ecosystem restoration.

More coordination is also needed between government and the private

sector to create long-term incentives for developing workforce capacity in this industry. The National Fire Plan and the Stewardship Contracting Pilot projects are two programs that demonstrate a sustained need for a highly trained ecosystem restoration workforce. Monitoring of these initiatives will need to consider not only the impacts of this work on the forest, but also the opportunities, wages, and conditions of the workers responsible for carrying it out on the ground.

For a written summary of the Pinchot Institute's Ecosystem Restoration Workforce Policy Workshop, please contact Peter Kostishack at (202) 797-6580 or peterk@pinchot.org.

1. Ecosystem Workforce Program. 2002. *The Ecosystem Management Industry: Scope and Trends*.
2. National Academy of Public Administration. 1999. *US Forest Service Workforce Plan*.

Ensuring the Future

Nonprofit organizations across the country are facing new challenges in the current economy. The recession has had a major impact on philanthropic foundations that provide much of the support for the nonprofit sector. Furthermore, after September 11, public support for nonprofit organizations outside of the health and human services arena has dropped as well, thus reflecting the unexpected decline in tax revenues, corporate profits, and the sudden return to major deficits in federal and state budgets.

The Pinchot Institute for Conservation is not immune to these economic trends. During the past several years, the Institute's board and staff have built a **Working Capital Fund** for unrestricted/general operating support. Furthermore, we established the **Pinchot Legacy Fund** last year as

an endowment to help ensure the Institute's long-term financial health and well-being. Such support is essential to our steadily providing timely research and policy analysis on key natural resource conservation issues as they arise. And in times such as these, the Working Capital Fund and Pinchot Legacy Fund become essential to continuing, without interruption, the kinds of innovative, quality programs for which the Institute has become known.

By far, the most important source of such support is unrestricted contributions from people like you. Through our annual campaign, donations via the Combined Federal Campaign, matching gifts from employers, and a number of innovative planned giving opportunities, those of you committed to conservation are helping to ensure that we continue to play

a leading role in this task of discovering new and creative solutions to the challenges of sound natural resource management.

Now more than ever, we need your support. If you have already contributed, particularly as a Pinchot Associate, we gratefully acknowledge your contribution and the continued vitality it brings. If you have not yet contributed, please consider doing so now, when it is most important to our having a lasting, positive impact on the future of conservation.

For more information on the different ways you can donate to the Pinchot Institute, please contact Kendra Miller, director of external affairs, at 202-797-6580, kmiller@pinchot.org, or visit our website at www.pinchot.org.

Lessons in Innovation: Trends and Issues of the FY2001 Stewardship Contracting Pilots

The Stewardship Contracting Pilot program was developed in 1999 to test several new administrative processes and procedures for the Forest Service. Authorizing legislation stated that the agency was granted these new authorities to perform services that would help achieve land management goals on the national forests, while helping to meet the needs of local and rural communities. These new processes and procedures include: the exchange of goods for services, retention of receipts, designation by prescription or description, contract award on a "best value" basis, and multi-year contracts.

In early June, the Forest Service officially released the FY2001 implementation report to Congress on its Stewardship Contracting Pilots. The Pinchot Institute develops this report annually for the Forest Service as part of its contract to direct the pilot program's multiparty monitoring and evaluation process.

INITIAL ASSESSMENT AND PROGRESS REVIEWS

During the early part of FY2001, the Pinchot Institute and our partners distributed standard packages of criteria to individual pilots to collect rel-

evant project information, and help provide a foundation for program assessment. The data contained in these packages provided background on each pilot and quick reviews of their status.

The criteria packages also provided an initial review of the agency's expanded authorities, which highlighted levels of usage and associated findings. This initial review found that for most projects, the authorities provided local units of the Forest Service with more options and greater flexibility to achieve objectives for ecosystem management (i.e., allowing management in low-value, high-access cost areas, and improving contract and implementation efficiencies through bundled contracts).

The data that was collected also provided valuable information on the program's significant accomplishments, including resource management activities that were completed (e.g., aquatic habitat restoration, terrestrial habitat improvements, hazardous fuels treatment, and road maintenance/rehabilitation) and preliminary benefits to the local socioeconomic conditions.



KEY ISSUES AND CONCERNS

As part of the monitoring and evaluation process, the Pinchot Institute began to tease out reoccurring issues and obstacles associated with the pilots. Based largely on the regional and national teams' valuable input, the Institute and its partners were able to identify specific trends in policy and administrative matters. Surprisingly, many of the critical, emerging issues were not isolated to a given region—rather, they seemed to reflect some of the general difficulties faced with managing public lands in a collaborative setting. These key issues are identified below:

Institutional Culture and Policy. In addition to requiring new methods and mechanisms for project design and implementation, these pilots also need greater collaboration to adopt broader stewardship goals and to implement projects at larger ecological scales. For as large and decentralized an agency as the Forest Service, meeting some of these new goals requires overcoming substantial institutional obstacles, such as innovative communication strategies, clear and direct internal policies/procedures, and gradual changes in the overall culture/attitude of the agency.

Several suggestions were offered to help ease the agency through this difficult process. For example, the Washington Office could develop a "command team" (an assemblage of experts) to disseminate important information and provide "barrier busting" resources to pilots facing planning/implementation obstacles. Other suggestions included expanding the focus of agency personnel beyond a single discipline

and increased training (specifically among contract officers and their representatives) to raise the agency's capacity to design and execute innovative mechanisms.

The NEPA Process. Numerous local and regional reports identified general inefficiencies in the agency's compliance with the National Environmental Policy Act (NEPA). The issues raised were not related to the relevancy of the legislation, but rather towards the need for streamlined procedures. At this early juncture, it could not be determined if the delays and time constraints associated with the NEPA process were isolated to the pilots or exacerbated by their nature. Further review and analysis of these issues will follow the third year of program implementation.

Funding. Local reports and subsequent team discussions also indicated that the current budget process has secured project funding, at best, over a two-year period. This is an abbreviated time period during which the pilot's large-scale restoration cannot be fully achieved. Additionally, the development of long-lasting, collaborative relationships with non-governmental partners cannot be achieved in such a short period. The pilots recommend that the Forest Service develop a budget process that reflects a sustained commitment to large-scale management efforts.

Community Involvement. Collectively, the pilots are also beginning to show that highly motivated community groups can have an impact that reaches far beyond individual stewardship demonstration projects. Community involvement has helped with landscape-level management (i.e., multiple stakeholders bring particular interest and expertise to the process to

allow for more efficient, effective and comprehensive management), while also building trust and enhancing community support for agency efforts. Additional reviews of FY2001 project data also indicate that firms and individuals in adjacent rural communities are capturing much of the economic benefit from the projects. Several projects have been multi-disciplinary in nature and have had a longer duration in scope, which helps enhance and sustain the local workforce.

Concern over Expanded Authorities. Through outreach and local team reports, some general concerns have arisen over the use of expanded authorities and perceived "perverse" incentives. In particular, many environmental groups are cautions of the "goods for services" and "receipts retention" authorities, which may directly link timber sales and restoration activities, thus creating potential conflicts of interest.

Concern over Project Design/ Implementation. Some concern has also arisen over the general implementation of the pilots. External interests have expressed concern over the individual project scale and the fact that additional projects continue to be authorized without first learning lessons from the initial 28 pilots.

CONCLUSION

In this second year of multiparty monitoring and evaluation, a great deal of progress was made—a monitoring framework was developed and implemented, project-level data was collected and synthesized, and emerging trends and early concerns were identified. At this early stage of the project's implementation, we are cautiously evaluating the overall effectiveness of the program and its authorities, as lessons continue to emerge and feed into the larger cycles of adaptive learning and ecosystem management. Through our efforts, we hope to enhance this educational and experimental initiative—testing not only the efficiencies of expanded authorities, but also means by which the agency can embrace and fully exercise the concept of collaborative forest stewardship.

To download a copy of the FY2001 implementation report, visit: www.pinchot.org/pic/cbf/report_2001.pdf. Please contact Andrea Bedell Loucks at 202-939-3455 or andreabedell@pinchot.org with questions on the Stewardship Pilots or the multiparty monitoring/evaluation process.



Farm Bill Creates Significant Opportunities for Private Forest Landowners

On May 13, President Bush signed into law the *Farm Security and Rural Investment Act of 2002*, otherwise known as the 2002 Farm Bill (see the Winter 2001/2002 issue of *The Pinchot Letter* for more information on the development of this bill). For only the second time in farm bill history, the 2002 bill included a Forestry Title (Title VIII).

The Farm Bill creates significant opportunities to both sustain the nation's forestlands and assist millions of private forest landowners in being good stewards of the land. The following is a summary of the key aspects of the bill that relate to forestry.

Repeal of the Forestry Incentives Program (FIP) and Stewardship Incentives Program (SIP): remaining funds appropriated for FY2002 may be used until depleted.

Creation of the Forest Land Enhancement Program (FLEP): a new cost-share program, which combines elements of both the House and Senate proposed cost-share programs, that was established to replace FIP and SIP, and encourages the long-term sustainability of non-industrial private forestlands.

State foresters will implement the program through the Secretary of Agriculture in coordination with State Forest Stewardship Coordinating Committees. Up to 75% of cost-share assistance will be used to instigate the activities and practices of State-approved action

plans that delineate priorities. FLEP will receive mandatory funding (not subject to appropriations) at a total amount of \$100 million through FY2007.

Creation of the Community and Private Land Fire Assistance Program: intended to promote firefighting efficiency at all levels of government on Federal and non-Federal lands and to protect communities from wild-fire threats. The program will be administered by the Forest Service and implemented through State Foresters or other State officials. It is authorized at \$35 million annually through FY2007.

Creation of the Sustainable Forestry Outreach Initiative: established by the Secretary of Agriculture, this initiative is an amendment to the Renewable Resources Extension Act that will educate landowners on the value and benefits of practicing sustainable forestry, the importance of obtaining professional advice in achieving forestry objectives, and the variety of public and private resources available to assist landowners. It is authorized at \$30 million annually through FY2007.

Though primarily aimed at agricultural farmers, the Conservation Title (Title II) includes several provisions that create opportunities for forest landowners. Non-industrial private forestlands are now eligible for enrollment under the **Environmental Quality Incentives Program (EQIP)**. This program provides cost-share and other incentive payments to agricultural producers and landown-

ers who promote environmental quality. EQIP is funded at \$9 billion through FY2007.

Forestlands were explicitly mentioned in several new or existing programs, including the **Conservation Security Program (CSP)**, the **Conservation Reserve Program (CRP)**, and the **Wildlife Habitat Incentives Program (WHIP)**. Moreover, a number of initiatives that were proposed in the 2002 Senate Farm Bill were dropped from the final bill. In addition, House and Senate members struggled to come to consensus around the issues of stewardship contracts and biomass-to-energy facilities, and in the end, these items were removed from the final Forestry Title. For more details on the Farm Bill's outcome, please visit the following link on our website: www.pinchot.org/pic/farmbill/recap.html.

The Pinchot Institute has tracked developments on the Farm Bill since the spring of 2001. With passage of the final bill, we will now be involved in facilitating input to the USDA agencies that are authorized to implement these programs. For more information on our efforts, please contact Nadine Block at (202) 797-6585 or nebblock@pinchot.org.



An Introduction to Certification for Private Forest Landowners

In cooperation with the Yale School of Forestry & Environmental Studies and with support from the USDA Forest Service, the Pinchot Institute for Conservation has produced, *A Guidebook to Forest Management Certification for Private Forest Landowners*.

Generally speaking, certification is a process by which private organizations measure forest management plans and practices against a range of established standards, then documents the results of that assessment. Certification attempts to offer a defensible approach to rewarding well-managed forests. According to the USDA Forest Service's Renewable Resources Planning Act's (RPA) 2000 RPA Assessment of Forest and Range

Lands, non-industrial, private forest landowners own 54.2% of the 747 million acres of forestlands across the United States. (As comparison, 27.4% of these 747M lands are in Federal ownership.) Our guidebook, which is an introduction to certification, was written with an eye towards addressing issues that affect these landowners with smaller holdings.

In an attempt to provide private forest landowners with pertinent, timely information about certification, our guidebook profiles the basic components (as of June 2002) of four major certification programs operating in the US: the American Tree Farm System, the Forest Stewardship Council, Green Tag Forestry, and the Sustainable Forestry Initiative.

Among other things, we have outlined the general steps of the certification process and highlighted the costs associated with each program. The guidebook also provides a list and a brief description of resources that may be of further assistance to private forest landowners contemplating whether to pursue certification. Though our guidebook does not evaluate or endorse any of the programs, it does, however, function as an objective source of information on private landowners' options and considerations for forest management certification.

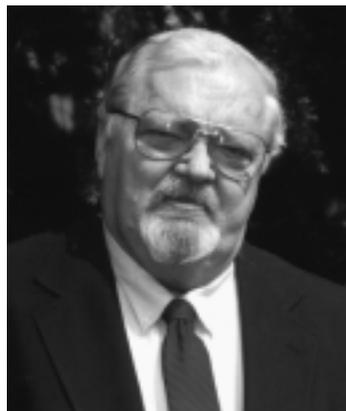
For more information on the guidebook, please contact Naureen Rana at (202) 797-6584 or nrana@pinchot.org. To request your copy, please visit the Publications page of our website at www.pinchot.org (reference Policy Reports) or call (202) 797-6580.

Giltmier Receives National Forest Policy Award

As an update to a recent announcement (see the Spring 2002 issue of *The Pinchot Letter*), the Institute is pleased to announce that former Pinchot Institute executive director Jim Giltmier has been selected to receive the Society of American Foresters' 2002 Sir William Schlich Memorial Award.

The nomination letter, written by Jim's peers at colleges and non-governmental organizations across the country, hailed his "substantial impact on the development of forest policy over the last 30 years." They cited his Congressional work, which began in 1971, as a staffer with the Senate Committee on Agriculture, Nutrition and Forestry and indicated how he "played an important role in developing several major pieces of legislation that now guide National Forest man-

agement and private forestry efforts." The nomination also applauded his skill at "building consensus among



James W. Giltmier

disparate groups and organizations behind the scenes," an initiative that the Pinchot Institute still undertakes

today. Jim was also further recognized for "laying the groundwork for [the Pinchot Institute's] later emergence as a prominent national forum for defining and debating forest policy issues."

The Society of American Foresters (a national scientific and educational organization representing the U.S. forestry profession) presents its Sir William Schlich Memorial Award biennially to recognize "broad and outstanding contributions to the field of forestry with emphasis on, but not limited to, policy and national or international activities." More information on the award and the Society can be found at www.safnet.org.

UPDATE: RENOVATION OF THE LETTER BOX



With help of a \$50,000 gift from a single individual (the largest, single gift from an individual in its history), the Pinchot Institute for Conservation has successfully raised \$116,000 from individuals, corporations, and foundations to meet the matching funds requirement for the prestigious *Save America's Treasures* grant, which was awarded in 1999 from the White House Millennium Council and the National Trust for Historic Preservation, to help renovate The Letter Box. These gifts will transform this small outbuilding on the grounds of the Grey Towers estate from Gifford Pinchot's office and archives to a conservation education center for children and adults in the tri-state (PA-NY-NJ) area and a research center for forestry professionals across the country.

The project is the second phase of an extensive renovation of the entire estate. The interior restoration, which is expected to begin before Fall, 2002, will include the installation of a new heating and air conditioning system and special ultra-violet window shades to protect early volumes of forestry and conservation books that will be housed there. Restorative treatments will also be applied to several political cartoons and an historic, 1899 map of the U.S. Territories and Insular Possessions.

The Letter Box was designed in 1925 by famed architect Chester Aldrich, architect for such sites as New York's famous *The Knickerbocker Club* (1915), Harkness Hall at Yale University (1928), and the Japanese Embassy in Washington, DC (1931). This building served an important role in Gifford Pinchot's political and personal life. For instance, his gubernatorial staff handled much of his correspondence from there. Moreover, as an avid letter writer, Pinchot used the space as an archive for his papers, which today comprise the largest civilian collection at the Library of Congress. As the birthplace of Pinchot's many innovative thoughts and writings on forest conservation, including his autobiography, *Breaking New Ground*, Grey Towers and, indirectly, The Letter Box, are celebrated as the birthplace of the American Conservation Movement.



The Letter Box

In 1963, the Pinchot Institute for Conservation was dedicated at Grey Towers by former President John F. Kennedy to continue Pinchot's forest conservation legacy. Given this, the Forest Service partnered with the Institute to raise the funds needed to restore this historic treasure.

For more information on the renovation or the programs that will be housed there, please contact Lori McKean at (570) 296-9630 or lmckean@fs.fed.us.

Grey Towers News Notes

NEWS OF PROGRAMS AND ACTIVITIES AT GREY TOWERS NATIONAL HISTORIC LANDMARK

CONSERVATION EDUCATION PROGRAMS "GROW" FROM WORK PROJECTS AT GREY TOWERS

The Forest Service staff at Grey Towers National Historic Landmark has figured out a way to overcome the sometimes daunting task of readying the site for the regular tour season, while trying to serve hundreds of school children visiting for their annual spring field trip.

Horticulturist Elizabeth Belcher was planning numerous springtime landscape projects and Education Specialist Lori McKean was scheduling outdoor conservation education programs when they hit upon the idea of having the students perform some of the tasks. Teachers, parents and students readily agreed to conduct "service projects" as part of their Grey Towers visit. Each project, which has

an educational component, is designed to enhance the students' awareness of their natural surroundings, and introduces them to Gifford Pinchot's conservation legacy. More importantly, the "hands-on" work within this program is designed to help the students promote a sense of stewardship for the land.

Some of the projects students completed were: tree planting (with a lesson on reforestation and deer management); making potting soil (with a lesson on composting and decomposition); wildflower seed planting (with a lesson on fire and regeneration) and trail work (with lessons on various forestry topics).

The staff at Grey Towers is looking for ways to involve youth and the community with additional educational service projects at the site. For more information on these and future

projects, please contact Elizabeth Belcher or Lori McKean at (570) 296-9630 or ebelcher@fs.fed.us or lmckean@fs.fed.us.

VOLUNTEERS MAKE BOOKMARKS FROM GREY TOWERS' ANNUALS

A team of volunteers is helping to preserve a bit of the Grey Towers landscape in a unique program that also raises funds for the site. Volunteers are pressing petals from the hundreds of annual flowers that grace Grey Towers' gardens and making them into bookmarks. The bookmarks are being sold for \$2.00 at the Grey Towers gift shop through the Eastern National Forests Interpretive Association. The project enables visitors to "take home" a piece of Grey Towers, while contributing to the programs here. Interested? Please contact Tower Shop Manager Lynn



Dennis at 570-296-9677 or ldennis@fs.fed.us.

PINCHOT TRAIL OF TIME READY FOR ANNIVERSARY OF GIFFORD'S BIRTH

The USDA Forest Service celebrated the 137th anniversary of Gifford Pinchot's birth on August 11, 2002 with refreshments, house and garden tours, and an introduction to the new Forestry Trail at Grey Towers. Interpretive material is now available for Grey Towers' visitors who walk the trail, which leads from the entrance of the estate to the historic amphitheatre. Fondly known as the *Pinchot Trail of Time*, this half-mile path now has numbered posts and a corresponding brochure that brings walkers from the time the Pinchot family arrived in Milford in 1818 to 1963 when the family donated the estate to the Forest Service. Eventually, permanent signs will replace the markers and brochure.

The *Trail of Time* is one of four

trails being developed at Grey Towers to enhance the visitor experience, offer additional recreational opportunities and augment the conservation education program.

FARMHOUSE AT GREY TOWERS RENOVATED

On June 7, 2002, a special recognition ceremony and ribbon-cutting marked the completed renovation of the original farmhouse at Grey Towers. The event was attended by community members, Forest Service personnel, and Pinchot Institute staff and board members, including Gifford's grandsons, Gifford III and Peter Pinchot.

Not much information exists on the origins of the farmhouse. It is likely that tenant farmers occupied the home pre-1886, when James Pinchot constructed Grey Towers. After 1960, Governor Gifford Pinchot's chauffeur was given life tenancy of the building. During the mansion's recent renovation, the farmhouse was used as an of-

fice for Forest Service curatorial staff. The Forest Service will now use the building to house seasonal employees, researchers, and scholars in residence.

Some interesting artifacts were revealed during the construction work. An old elixir bottle and "dime-store" romance novel were discovered behind a second-story wall. The signature "JW Pinchot" was revealed on the inside of an exterior wall plank, which could indicate that the wood was obtained from the Pinchot dry goods store in Milford. It also was discovered that the building probably was one-and-a-half stories high instead of the current two stories, which is what led to some structural problems.

The \$342,000 renovation, completed by L.R. Costanzo Construction Service of Scranton, is one of a series of projects included in the overall historic renovation of Grey Towers. For more information on the renovation, please contact Charles Herne, project manager, at 570-296-9630 or cherne@fs.fed.us.

GREY TOWERS MORTIMER GARDEN INTERNSHIP OPPORTUNITY

Through the generosity of Elisabeth and Charles Mortimer, the Elisabeth S. Mortimer Garden Internship at Grey Towers National Historic Landmark was established in 1994 to provide an aspiring horticulturalist with invaluable practical experience.

Set along the Delaware Water Gap in Milford, Pennsylvania, Grey Towers is a 116-year-old, French-chateausque mansion designed by Richard Morris Hunt. The 101-acre site, administered by the USDA Forest Service, consists of formal, landscaped and wooded grounds. The student chosen for this opportunity will receive a \$2,000 stipend and hands-on experience that will challenge and broaden practical applications learned in horticultural theory.

The Mortimer Garden internship opportunity is open to students above the freshman level who are interested in a variety of fields of study. Past participants in this 10-12 week summer program were enrolled in such disciplines as ornamental horticulture, forestry, and landscape architecture.

Resumes are being accepted now for Summer 2003. For more information on the application process or on this unique opportunity, please contact Grey Towers Horticulturalist Elizabeth Belcher at (570) 296-9661 or ebelcher@fs.fed.us.

Speth Receives Blue Planet Prize

James Gustave “Gus” Speth, Pinchot Institute board member and dean of the Yale School of Forestry & Environment Studies, was recently awarded the international environmental Blue Planet Prize by The Asahi Glass foundation, a Tokyo-based foundation that supports leading-edge scientific and technological research, and recognizes efforts to solve issues of global concern. The prestigious prize has been awarded annually since 1992 to two individuals or organizations that have made major contributions to global environmental conservation. The other recipient of this year’s prize is Dr. Harold Mooney, the Paul S. Achilles Professor of Environmental Biology at Stanford University.

Gus was awarded the prize for “a lifetime of creative and visionary leadership in the search for science-based solutions to global environmental problems, and for pioneering efforts to bring these issues—including glob-

al climate change—to broad international attention.” The award recipients will each receive 50 million yen (\$425,495 USD), and will be honored at a November, 2002 ceremony in Japan.

The prize citation observes that Gus “has devoted his career to creating and invigorating environmental institutions of extraordinary importance.” It also notes that he played a leadership role in creating the Natural Resources Defense Council in 1970, and that he was among the first to call for international action on global climate change. In 1980, “he helped to predict the current challenge to the global environment in the *Global 2000 Report*, as chairman of the Council on Environmental Quality in the Carter Administration. He then founded the World Resources Institute and led it in the search for science-based solutions to large-scale environmental threats. He went on to serve as administrator of



J. Gustave Speth

the United Nations Development Programme and focused the agency on sustainable, people-centered development. As Dean, he now seeks to help the School of Forestry & Environmental Studies become the first global school of the environment.”

For additional information on the award and the Foundation, please visit the Foundation’s website at www.af-info.or.jp/index/index_e2.html.

UPCOMING EVENTS

A Rendezvous with Destiny: The Life and Times of Franklin D. Roosevelt (in conjunction with National Public Lands Day) with Peter Osborne, Minisink Valley Historical Society September 22, Grey Towers National Historic Landmark, Milford, PA. For information, please call (570) 296-9630.

Music at Grey Towers

October 5, Grey Towers National Historic Landmark, Milford, PA. For information, please call (570) 296-9630.

2002 Society of American Foresters National Convention

October 5-9, M.C. Benton, Jr. Convention Center, Headquarters hotel: Adams Mark Winston Plaza,

Winston-Salem, NC. For information, please visit www.safnet.org.

Storytelling and Bat Watch with National Park Service staff, Delaware Water Gap National Recreation Area October 30, Grey Towers National Historic Landmark, Milford, PA. For information, please call (570) 296-9630.

Regular Tour Season Ends

October 30, Grey Towers National Historic Landmark, Milford, PA. For information, please call (570) 296-9630.

A Celebration of Our National Bird (in honor of Veterans Day)

November 9, Grey Towers National

Historic Landmark, Milford, PA. For information, please call (570) 296-9630.

Annual Christmas at Grey Towers Celebration

A month-long celebration of the season with an open house, traditional decorations, programs and performance. Grey Towers National Historic Landmark, Milford, PA. For information, please call (570) 296-9630.

A Christmas Carol, performed by Joe Plummer and son.

December 7-8, Grey Towers National Historic Landmark, Milford, PA. For admission price and additional information, please call (570) 296-9630 after November 1.

FROM THE PROFESSIONALS

From the Professionals is a tri-annual column of finance and investing tips from different members of the professional services industry. The opinions represented here are authorized by the following firm, and may not reflect those of the Pinchot Institute for Conservation.

Family Land for Generations

William A. Conway, JD
Law Offices of William A. Conway, PC
McLean, VA

A popular misconception is that only the very wealthy hope to pass family land on to the next generation. Many families of modest wealth are unaware that a tract of farmland, vacation home, lake property or even the old family home may be lost to the next generation without the sophisticated planning that includes a conservation easement.

CONSERVATION EASEMENT DEFINED

A conservation easement is simply an agreement between the landowner and a land trust that permanently protects the land from development, while leaving it in private ownership. Depending on the easement's provisions, the landowner can continue to live on and work the land, and even sell it or pass it on to their heirs after death. The restrictions on the land reduce its overall value, thus reducing the value of the estate and therefore, the estate tax that may be due.

The owner who makes such a donation receives the immediate benefit of a charitable donation, applied against income tax. Under current Internal Revenue Code rules, most gifts of land allow a taxpayer to deduct up to 30% of adjusted gross income in the year of the donation. If the value of the gift is more than the deduction, the balance can be carried forward for up to five years.

THE NEED

Dramatic development in many parts of the country has sent property values soaring during the past two decades. It's a common, but sad story—the family is forced sell land that has been in the family for generations, all to pay estate taxes. This story has been repeated again and again on working ranches, small to large farms, and even modest residences.

The tremendous increase in land under conservation trust in the past decade indicates this technique is gaining popularity as families learn of the associated estate tax benefits. Even for families who have acquired land in the last twenty years, appreciation in some areas of the country has been so extreme that a \$20,000 property may now be worth more than \$300,000.

HOW IT WORKS

As an example, consider a home and five acres purchased in 1975 for \$100,000, now worth \$1,000,000. When these highly appreciated properties inflate the estate's total value, a desire to keep the property in the family after the owner's death may be seriously jeopardized. Under current tax law, the rest of the owner's estate will be subject to tax because the property absorbs the entire exemption amount of \$1,000,000. If land-



William A. Conway, JD

use restrictions under a conservation easement reduce the value of the property by \$400,000, this could get the total estate value under the exemption amount and provide an immediate income tax benefit for the owner. If the contribution of the easement transfers as a bequest at death, the property could also qualify for as much as \$500,000 in additional estate tax exclusion.

Qualified conservation easements were once the tools of only the very wealthiest families, and the tax benefit of such donations applied only to income tax. The Taxpayer Relief Act of 1997 added another inducement, an estate tax exclusion of up to 40% of the land's value (excluding improvements) that is subject to the easement.

ADDITIONAL CONSIDERATIONS

Conservation easements can be flexible depending on the land use. An easement on farm property might allow additional structures to be built that relate to farming, while land hosting a wildlife habitat might prohibit any development whatsoever. Obviously, an easement can apply to

only a portion of the property and public access is not required.

When you donate a conservation easement to a land trust, you do indeed give up some rights associated with the land, but the benefits to your family can be substantial. Clearly, many families are choosing this technique—more than six million acres were under trust by 2000, and over 1,200 non-government nonprofits worked with landowners to conserve their lands.

Establishing a conservation easement may be a viable option for you and your family. For more information on this valuable, tax-advantaged tool, please contact a tax attorney for professional advice or Kendra Miller, the Pinchot Institute's external affairs director, at 202-797-6580 or kmiller@pinchot.org for a referral or to obtain details on the Institute's policies.

William A. Conway, JD is a tax attorney, investment banker, and legal educator specializing in estate, tax, and charitable gift law. His unique set of skills enables him to serve his clients with both financial and legal counsel as a registered investment advisor and tax attorney, and a member of the bars of the Commonwealth of Virginia, the District of Columbia, and the State of Maryland.

His practice is dedicated to building wealth enhancement strategies for his client families' estates and businesses by using far-reaching, advanced planning to preserve wealth for future generations. Each week, his Family Fortunes planning tips is broadcast on WMAL 630-AM, a Washington, DC news/talk radio station.

BECOME AN INNOVATOR FOR FOREST STEWARDSHIP

Concerned about the changing global climate? Not sure if the natural resources we enjoy today will be here tomorrow for future generations? Dissatisfied with the quality of your water?

Not sure if you can make a difference? Well, you can. Make today your first day as an innovator for forest stewardship by becoming a **Pinchot Associate**.

As a Pinchot Associate, you will join others across the nation who invest resources the Pinchot Institute needs to quickly, yet thoughtfully, respond to natural resource issues *before* they become policies that ruin our environment, diminish our livelihood or destroy our quality of life. The flexibility your unrestricted gift provides enables us to collaborate nationwide with all of America's people—from rural landowners to federal policymakers—to sustain natural resources and build economic capacity through educational programs, research on forest-management policies, and technical assistance for on-the-ground projects.

As a natural resource steward, becoming a Pinchot Associate will enable you to feel good about protecting our environment while helping others. For your gift of \$100 or more, we will:

- Keep you informed of timely natural resource issues through *The Pinchot Letter*;
- Send you advanced notification of our workshops, seminars, conferences, and newly released publications;
- Give you special recognition in our year-end newsletter and annual report;
- Send you invitations to special events we host in your community, Washington, DC, and at Grey Towers so you can see for yourself how you are helping to advance forest conservation.

Your gift can be made to the Pinchot Institute through the Combined Federal Campaign or by returning the enclosed envelope. For information on additional tax-advantaged ways to become an innovative conservationist and follow in Gifford Pinchot's shoes, please contact External Affairs Director Kendra Miller at (202) 797-6580 or kmiller@pinchot.org.



Pinchot Institute for
Conservation; charity #1010

The Pinchot Influence: Calvin W. Price

B.J. Sharp-Gudmundsson
PatchWork Films

Editor's note: Not only did Gifford Pinchot make a direct impact on forest conservation during his lifetime, he also greatly influenced others, who also played a role in the American Conservation Movement.

Calvin W. Price, life-long friend of Gifford Pinchot and homespun editor of the last hand-set newspaper in America, is the subject of a documentary being produced in West Virginia by PatchWork Films.

The Pocahontas County Free Libraries in Marlinton, WV, is the sponsor of *The History of the Pocahontas Times* as told through the story of its sage editor, Cal Price, who manned the press from 1906 to 1957. Price's observations, experiences, and the customs and traditions of his people living in the endless mountains were regularly reprinted in the large daily newspapers. As such, he was admired throughout the nation as "The Old Master of Mountain Journalism."

A well-known naturalist and conservationist, Price believed that "you

don't grow good people on poor land." His friendship with Gifford Pinchot, the nation's first professional forester, led him to testify before Congress to support the formation of our national forests and parks. Regularly quoting Pinchot in his editorials and speeches, Price's favorite quote was from a visit to Pinchot's office in Washington as they admired a large picture of the Yangtze River hanging behind the desk. Pinchot stated, "It took the Chinese 5,000 years to destroy their forests, but Americans have done almost the same thing in their country in 300 years." Price was so moved by this statement that he printed it verbatim.

Price's many accomplishments included being named the first President of the West Virginia Wildlife Federation and officer of the National Wildlife Federation. In 1954, West Virginia honored his conservation efforts by dedicating 11,000 acres as the "Calvin W. Price State Forest," of which Price was "sinfully proud."

Pinchot Institute Senior Fellow,

Trinity University professor and noted author, Dr. Char Miller, will appear in this film, which premieres at the West Virginia Filmmakers Festival in Sutton, WV on October 11, 2002. "The fascinating thing about these two men's relationship," Miller observes, "is that it reminds us just how crucial grass-roots organizers like Price were to the larger conservation movement. Without the West Virginian's commitment and energy, and without that of thousands of men and women throughout the nation, there would have been no movement. Pinchot was well aware of his need for support from people like Price, one reason why he kept in such close contact with him over the years."

For more information on the film or the festival, please contact PatchWork Producer B.J. Sharp-Gudmundsson at 304-645-4998 or email bj645@yahoo.com. You can also visit www.calpricethirty.com for more information on the film, Cal's conservation edict, and Gifford Pinchot's influence.

SUTTON 2002

**West Virginia Filmmakers Festival
Landmark Studio for the Arts (Sutton, WV)
October 4-6 and 11-14**

**World Premiere
Friday, October 11, 7:00 p.m.**

Cal Price and The Pocahontas Times

B.J. Sharp-Gudmundsson will present her second documentary feature from Pocahontas Country about Calvin Price and *The Pocahontas Times*, one of West Virginia's most unusual and influential newspapers.

THE PINCHOT LETTER

News from the Pinchot Institute for Conservation FAX / MAIL-IN RESPONSE FORM

- I would like to be notified via email of new issues of *The Pinchot Letter* available on your website.
- Please add my friend or colleague to your mailing list to receive *The Pinchot Letter*; their contact information is below.
- I would no longer like to receive *The Pinchot Letter*; please remove my name from your mailing list.

Name _____

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Additional remarks/ comments/suggestions:

Thank you! Please fax or mail this form to:

Pinchot Institute for Conservation
1616 P Street, NW
Suite 100
Washington, DC 20036
Fax: 202-797-6583

IN YOUR OPINION...

Last year, the Pinchot Institute for Conservation received an overall superior rating from Dunn & Bradstreet, the leading provider of business information worldwide. In addition to hearing the thoughts of the surveyed organizations, we would be delighted to learn yours.

How did you initially hear about us?

If you could characterize us in three words or less, which would you choose? _____

Why? _____

In your own words, please describe what we're trying to accomplish?

Is this something you believe in?

In your opinion, what are our strengths? _____

Our weaknesses? _____

Thank you for your time and attention. Please fax or mail this questionnaire to:

Pinchot Institute for Conservation
1616 P Street, NW
Suite 100
Washington, DC 20036
Fax: 202-797-6583



CONTINUING THE PINCHOT LEGACY

HOW CAN YOU MAKE A DIFFERENCE IN FOREST CONSERVATION?

Partner with us by making a fully tax-deductible gift to:

- ✿ The **Working Capital Fund** — to help us provide decision makers with timely information and analysis on key issues in natural resource policy.
- ✿ The **Pinchot Institute Legacy Fund** — planned/deferred gifts for an endowment to ensure our long-term financial well-being.
- ✿ The **101 Scholarship** and **Mortimer Garden** funds — to offer internships and scholarships to future natural resource professionals.
- ✿ The **Grey Towers Fund** — to offer training workshops, educational conferences, and to assist with other initiatives at Grey Towers, the Institute's home.

OR

- ✿ Become a **Pinchot Associate** and receive advanced notification of our activities and publications; special mention in our printed materials; and invitations to events held in your community, Washington, DC and at Grey Towers.

Other tax-advantaged ways to help us conserve America's forestlands are to:

- ✿ Contribute in-kind goods or services to the Institute.
- ✿ Donate online on a secure server via our website, www.pinchot.org.
- ✿ Have your employer maximize your investment through its matching gift program.
- ✿ Donate appreciated securities through your broker or a donor advised fund, like Fidelity Investment's *Charitable Gift Fund*.
- ✿ Establish a future or planned gift from your assets that would offer you exceptional benefits, such as a guaranteed income for a fixed number of years after retirement

For more information on these and other ways to make an investment towards the future of America's forests, please contact Kendra Miller at (202) 797-6580 or kmiller@pinchot.org.

PINCHOT INSTITUTE FOR CONSERVATION

Leadership in Forest Conservation Thought, Policy, and Action.



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