

A 10-Point Guide to Reaching “Non-Joiner” NIPFs in the Eastern US

Prepared by: Catherine M. Mater – Senior Fellow;
The Pinchot Institute for Conservation
Washington, D.C.
541-753-7335; 541-752-2952 fx
catherine@mater.com
www.pinchot.org

Funded by the Wood Education and Research Center (WERC), the Pinchot Institute for Conservation embarked on a research project to better understand drivers of forest fragmentation and conversion from non-industrial private forestland (NIPF) owners in the eastern hardwood forests of the US. In particular, the Institute wished to focus on “*non-joiner*” NIPFs - those forestland owners outside of the traditional information loop:

- they do not belong to forest industry or woodlot owner associations;
- they only periodically rely on technical assistance advisory services;
- they manage their own forestlands.

Based on the interview results for the 2001 project “***Impacting Non-Joiner NIPF Decisions Which Drive Forest Fragmentation and Conversion***”, *impact groups* – those who are intended to impact and influence NIPF decisions in the region (**state coordinators, professional foresters, SAF chairs, and smart growth groups**) – may find the following 10-point guide helpful in effectively reaching out to *non-joiner* NIPFs in their regions:

- ✓ **Understand that the “*most valued characteristics*” of forestland identified by non-joiner NIPFs may disconnect with their “*reason for ownership*” of those forestlands.**

Over 60% of non-joiner NIPFs interviewed for this WERC project purchased, rather than inherited, their forestland. Their reasons for owning the forestlands are quite different than what they identify as their land’s most valued characteristics:

The top 4 non-joiner responses . . . messages do conflict!

<i>Most Valuable Characteristics of Forestland</i>		<i>Reasons for Ownership</i>
<ul style="list-style-type: none">• View/scenery• “It’s mine”• Timber• Wildlife	vs	<ul style="list-style-type: none">• Home• Investment• Timber• Love of land & recreation
<ul style="list-style-type: none">= 42%= 15%= 15%= 10%		<ul style="list-style-type: none">= 31%= 31%= 26%= 23%

Note: (Multiple answers per respondent possible)

Non-joiner NIPFs may have a lot in common with their `joiner' NIPF counterparts in this area. Relying only on a landowner's perception of the most valued characteristics of their forestland may provide a thin surface for strategy development. Such a strategy may actually conflict with much more driving reasons why the landowner purchased the forestlands to begin with. Outreach messages and strategies that can jointly convey understanding of both viewpoints – in this case the importance of a “*view/scenery*” characteristic matched with an “*investment*” and “*timber*” focus – provide a much better chance achieving effective linkage with non-joiner NIPFs.

✓ **Understand that *perception is a much a fact as a fact itself.***

What members of impact groups see as important drivers to forest fragmentation and conversion may differ significantly from what non-joiner NIPFs see as major drivers. That doesn't mean that one is right and one is wrong. The fact that non-joiner NIPFs ranked concern over estate taxes at the low end of issues that drive fragmentation and conversion decisions doesn't mean that improvements in estate tax policy aren't necessary and needed. Hard evidence may illustrate just the opposite. What's important to acknowledge is that many non-joiner NIPFs *do not perceive* estate taxes to be a critical issue. In this case, perception is the “fact” that you're working with, so focusing outreach efforts on estate tax planning or estate tax policy changes to reach non-joiner NIPFs may likely miss the mark. Know your audience; know what's perceived to be important to them.

✓ **Shift the outreach messages.**

Focusing on the issue of taxes as an over-arching national strategy will likely miss the mark. This is not to be construed as discontinuing work on important tax issues like estate tax concerns, but acknowledge that the perception landowners have is that “they've got it covered “ and will not likely know the difference until an `event' occurs

✓ **Acknowledge the significant “nothing” response as a real issue in breaking the communication barrier.**

With such a large percentage of non-joiner NIPFs perceiving that “*nothing*” would drive them to fragment or convert their forests, finding ways to connect and communicate with these landowners to better prepare them for *unforeseen events* that likely will cause conversion becomes a daunting task. Impact groups might look to innovative ways to inform these landowners. For example, over 60% of non-joiner NIPFs interviewed for the WERC project have e-mail access in the home, and more stated it was “*coming quickly to our family*”. While non-joiner NIPFs may be less likely to track down a consistent flow of forest management information, they may respond exceptionally well to receiving an e-mail update once a month on issues of particular interest to them: **growing offspring interest in the family forest; preparing for unforeseen financial needs; connecting with innovative forest investment tools that benefit offspring interest; looking to the horizon on property tax issues in their state.**

✓ **Work through state forestry divisions:**

As noted in the WERC study results, foresters in state forestry divisions appear to have the highest level of positive influence on non-joiner NIPFs. Non-joiner NIPFs interviewed ranked state foresters as “*the best sources for forestry assistance*”. Professional foresters also appear to be highly regarded, but financial access to these professionals may be more limiting for many. This may suggest that more strategic collaboration between impact group members needs to occur to reach non-joiner NIPFs, with state forestry divisions serving as a central mechanism to reach these landowners. The lower ranking of extension, university, and industry foresters from a non-joiner NIPF perspective might also suggest stronger collaboration with state forestry divisions is required if the intended desire is to impact decisions on forest fragmentation and conversion.

✓ **Target the lack of offspring interest concern.**

This is a serious issue. 85% of non-joiner NIPFs interviewed have children, and 54% of those have children of adult age. Even so, only 34% of those landowners involve their children in the forest management planning process. Look at evaluating and implementing strategic plans that directly address the disconnect between parents and offspring in maintaining forest lands in family hands:

- Connect in with Family Business Programs offered at targeted universities throughout the US
- Interview the offspring in your region: document their concerns.

✓ **Connect with creative funding options.**

- Consider seeking the **Forest Bank** program for application in your region. The program is designed and implemented by The Nature Conservancy in the North Eastern US, and specifically targets private forestlands where ecosystems of interest exist. Here’s how it works:
 1. NIPF landowners make a “deposit” in the Bank permanently transferring the right to manage and harvest their timber to the Forest Bank. *The landowner retains full ownership of the land itself.*
 - 2.
- Look at establishing a Forest Equity Loan Program for NIPFs; similar to Home Equity Loan programs

- ✓ **Adjust strategies to acknowledge the true distinctions and similarities in concerns between geographic regions.**

Non-joiner NIPFs in the Northern states (PA, MA, NJ, NH, VT) were far more concerned about taxation issues than their counterparts in Southern states (NC, SC, VA, GA). Similarly, Northern non-joiner NIPFs also appeared markedly more concerned about lack of offspring interest in maintaining forestlands in family hands. Conversely, NIPFs in Southern states indicated a markedly higher level of concern regarding real estate pressures driving decisions to fragment and convert their forestlands at the time of land transfer to their heirs.

- ✓ **Understand that traditional conservation tools – at least as they are typically defined - may not be the answer.**

Conservation easements may work well with some landowners, but almost 60% of the non-joiner NIPFs said they would not use CEs (even though over 50% had a good understanding of what CEs are and what they do).

- ✓ **Re-evaluate what *drives* decisions to fragment and convert forests, and what becomes a *consequence* of those drivers.**

As evidenced in the survey results, real estate pressures do not appear to have nearly the “driver” impacts as envisioned by those who service those landowners. But, if offspring interest is not there to continue the forest, other options quickly become an immediate consequence and reality.