



Center for Nonprofit Strategies

Clear Actionable Advice.

Motivating Woodland Owners to Take Action

A focus group study of Woodland Retreat Owners and Working the Land Owners in North Carolina, Pennsylvania and Colorado

**Prepared for the Sustaining Family Forests Initiative
By the Center for Nonprofit Strategies**

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1. Background and Objectives

The Sustaining Family Forests Initiative (SFFI) is a collaboration led by the Yale School of Forestry & Environmental Studies Global Institute of Sustainable Forestry and the US Forest Service Family Forest Research Center in partnership with the Center for Nonprofit Strategies aimed at gaining and disseminating comprehensive knowledge about family forest owners throughout the United States.

Since individuals and families own almost a third of forested land in the US, their decisions and actions have a significant impact on the health and maintenance of our forest resources. SFFI serves as a generator and integrator of information about woodland owners, in order to help a broad range of organizations be more strategic and effective in their outreach to this important constituency.

SFFI has identified four segments of woodland owners, based on their reasons for owning woods.¹ This study was conducted with two of the four audience segments—Woodland Retreat Owners and Working the Land Owners. Both of these landowner segments derive a great deal of enjoyment and emotional satisfaction from their woods—large proportions say they own their woods for recreational use, privacy and beauty, to maintain biodiversity and to leave a legacy for future generations. The main difference between the two segments is that Working the Land owners also rely on their land for income, e.g. via timbering, collection of non-timber forest products, and firewood.

These focus groups were conducted to better understand these two segments and to provide guidance for messages and programs designed to reach and persuade them to take stewardship and conservation actions. Building on SFFI's earlier research, we tested how these two types of woodland owners interact with their woods, what actions they currently perform, and what might motivate them to perform more desirable management actions.

¹ For a detailed discussion of the segmentation please see: Butler, B. J., Tyrrell, M., Feinberg, G., VanManen, S., Wiseman, L., and Wallinger, S. (2007). Understanding and Reaching Family Forest Owners: Lessons from Social Marketing Research. *Journal of Forestry*, October/November 2007. Also visit <http://engaginglandowners.org/new-landowner-research/sffi-landowner-types>.



2. Methodology

The design of the study called for a total of nine focus groups in three states—Pennsylvania, Colorado and North Carolina. In each state, we planned to conduct one group with Woodland Retreat Owners, one with Working the Land Owners and one with new woodland owners.

As in past SFFI research, woodland owners were identified from tax rolls in counties near the chosen focus group location.² A phone match service was used to generate phone numbers for these landowner lists. A professional recruitment facility was then hired to contact woodland owners, administer a screener to identify qualified participants, and recruit them for the relevant group. Woodland owners were offered a small stipend for participating in this research.

Participants were classified as Woodland Retreat owners or Working the Land owners based on their response to the following question:

People own land for a variety of reasons. I'm going to read five statements that describe different feelings people might have about their land. Please tell me how well you feel each one describes you on a 1 to 10 point scale, where 10 means it describes you completely and 1 means it doesn't describe you at all. First...

- A. I generate income from my land or own it for financial investment purposes*
- B. I own my land for the enjoyment of the scenery*
- C. I own my land for the privacy it affords*
- D. I use my land for recreation purposes*
- E. I'm not particularly involved with my land*

To qualify as a Woodland Retreat owner, a respondent had to rate both A and E lower than 7, and had to have high scores of 7-10 for B or C. Either B or C had to be the highest rated statement among the five presented to them.

If a respondent rated A, B, C and D about equally highly (i.e. scores of 7-10) and gave E a rating lower than 7, he/she was identified as a Working the Land owner and invited to participate in the study.

New landowners were identified as people who had acquired land within the last 5 years (i.e. in 2008 or later).

In addition, all participants had to meet the following criteria:

- They had to own between 10 and 1000 acres of wooded land in that state.

² In Colorado, we pulled tax rolls from LaPlata county; for Pennsylvania, we recruited from Center County, and for North Carolina we used tax rolls from Johnston, Franklin, Nash, Wayne, Greene, Halifax, and Warren counties.



- They had to be responsible for making decisions for that woodland, either alone or jointly.
- They were not a forester, forestry expert or logger

During the course of the study, the design of the study and recruitment criteria had to be modified owing to the difficulty of recruiting landowners that fit our criteria. Four changes were made.

First, we decided to stop trying to recruit new landowners. There were very few new landowners in our landowner lists and even those who were identified as new landowners based on their having purchased wooded land during or later than 2008 turned out not to be completely “new” to the practice of owning woodland. Most of the participants that showed up at our Pennsylvania group for “new” owners had owned other parcels of woodland in the past. We estimate that the incidence of landowners that acquired their first piece of wooded land less than 5 years ago is less than 1 percent of the total landowner population, making it a very difficult group to recruit for in-person focus groups. Research with this population will probably need to use a different methodology and/or substantially higher incentives to engage this rare group of landowners.

Second, we changed the recruitment criteria. We found it very difficult to find landowners who qualified as Working the Land owners. After the first wave of groups in Pennsylvania, we relaxed the recruitment criteria for this group. We also amended the question to use a 7-point rating scale:

People own land for a variety of reasons. I'm going to read four statements that describe different feelings people might have about their land. Please tell me how well you feel each one describes you on a 1 to 7 point scale, where 7 means it describes you completely and 1 means it doesn't describe you at all. First...

- A. I generate income from my land or own it for financial investment purposes*
- B. I own my land for the enjoyment of the scenery*
- C. I own my land for the privacy it affords*
- D. I use my land for recreation purposes*

Under the revised scheme, to qualify as a Woodland Retreat owner, a participant had to give their highest rating to statements B or C, and this rating had to be at least 6. They also had to rate statement A lower than 4.

To qualify as a Working the Land owner, landowners had to rate statement A as 4 or greater, and of B, C and D, at least two had to have scores of 6 or 7.

Third, we increased the participant incentive to \$100 (from \$50). Although we had found \$50 to be quite sufficient to ensure participation in prior research (focus groups held in 2009), the difficulty of recruiting participants as well as the high “no show” rate forced us to offer the



higher incentive. Despite this higher incentive, and despite the fact that participants were contacted to confirm their participation the evening before the groups, the “no show” rates for this study were fairly high.

Fourth, to ensure higher participation in North Carolina, we conducted both focus groups and in-depth interviews at two locations. In Goldsboro, we recruited for one focus group with Woodland Retreat owners and 4 in-depth interviews with Working the Land owners. In Rocky Mount, we recruited for one focus group with Working the Land owners and 4 in-depth interviews with Woodland Retreat owners. Only five of the 8 recruited interview participants kept their appointments.

In light of these changes, this report summarizes data from a total of 7 focus groups and five in-depth interviews with woodland owners in three states.

- Two groups of landowners in Penn State, PA on December 4-5, 2013—one with Working the Land owners, one with Woodland Retreat owners. (This report does not include any data from the New Landowner focus group.)
- Three groups of landowners in Durango, CO on December 12-13, 2013. Two of these group discussions were with Woodland Retreat owners and one was with Working the Land owners.
- Two groups of landowners in North Carolina— Woodland Retreat Owners in Greensboro and Working the Land owners in Rocky Mount—on May 16-17, 2014. In addition we also conducted in-depth interviews with three Woodland Retreat Owners and two Working the Land owners in North Carolina.

The recruitment protocol and screener for each location is appended to this report (appendices A, B and C).

Content of the Discussion

This research is informed by and builds on prior research studies by SFFI. Most directly, it adds to a set of focus groups conducted by SFFI in the Midwest in 2009, which explored the fundamental orientations of Woodland Retreat and Working the Land owners towards their woods, and tested specific message ideas. This set of focus groups elaborates on the findings of the earlier study by testing motivators and barriers for specific management actions and activities. As applicable, we have drawn out and emphasized the differences between Woodland Retreat and Working the Land owners.

These group discussions lasted about 90 minutes, including some time for introductions and brief conversations about participants’ woods. The conversation opened with a discussion of what good stewardship means to participants. Next, to add some granularity and specificity to this discussion, we asked participants to identify stewardship actions that they have taken or wish to take in the future. The rest of the time was focused on understanding landowners’

motivations and barriers with regard to specific stewardship actions, some of which were mentioned by the participants and others that were introduced by the moderator.

Based on the concerns raised by participants and the location of the group, the moderator focused the discussion on a subset of the following actions:

- Consulting with a forester or wildlife specialist regarding your woods/doing a woods walk with them.
- Undertaking wildlife habitat improvement projects.
- Getting a written stewardship plan.
- Harvesting trees (or planning a harvest):
- Participating in a government program for woodland owners, e.g. a cost share or tax reduction program.
- Checking for diseased plants, pests or invasive species; removing them.
- Taking actions to mitigate risk of fire or fire damage (in Colorado)

The moderator asked questions to assess landowners' knowledge and attitudes regarding each action under discussion, as well as the reasons why landowners may or may not wish to take that action.

The last part of the discussion was focused on legacy planning and landowners' openness to considering conservation easements (or other use restrictions) on their wooded land.

The discussion guides for each location are appended to this report (appendices D, E, and F). The guide for the interviews in North Carolina appears in Appendix G.



3. About the Participants

Group	Location	Landowner Segment	Number and Gender of participants	Acres Owned
1	Penn State, PA	Working the Land (WTL)	7 participants representing 4 ownerships; 4 women and 3 men.	On average, participants owned 80 acres of land, of which approximately 31 acres (or 39%) were wooded. Most often, the rest was farmland, often rental farms.
2	Penn State, PA	Woodland Retreat (WR)	12 participants representing 11 ownerships; 5 women and 7 men	The average land acreage for this group was 84, but this was inflated by two exceptionally large values (200 and 360 acres). Most of the others owned less than 50 acres. On average two-thirds of their land was wooded.
3 & 4	Durango, CO	Woodland Retreat (WR)	9 participants representing 7 ownerships; 3 women and 6 men	Average lot size was 59 acres, with about 40 of these (two-thirds) being wooded.
5	Durango, CO	Working the Land (WTL)	4 participants, representing 3 ownerships; all men	Participants owned multiple lots averaging 471 acres of land, of which about three quarters was wooded
6	Rocky Mount and Goldsboro, NC	Working the Land (WTL)	3 focus group participants in Rocky Mount; 1 woman and 2 men. 3 IDI participants in Goldsboro representing 2 ownerships; 1 woman and 2 men.	On average, these participants owned 64 acres of land. About a third of it was wooded.
7	Goldsboro and Rocky Mount, NC	Woodland Retreat (WR)	7 focus group participants in Goldsboro representing 6 ownerships; 3 women and 4 men. 3 IDI participants in Rocky Mount; 2 women and 1 man	The average acreage for these participants was 118 acres, and less than half of it (46 acres) was wooded. All but two participants had less than 50 acres of woodland.



- * As in past research, the number of participants is greater than the number of ownerships because some people brought their spouses or other co-decision makers.

Differences by Location

Most of the differences in landowners' responses at the three locations related to their lot sizes, topography of the land, historic land use patterns and threats to forest health.

In Pennsylvania's Center County, most wooded land was attached to farms, and most woodland owners had farming backgrounds. Wooded lots tended to be small, often on hill slopes or near streams, on land that cannot be farmed. Because parcels are small, timbering and management practices are harder to do. A few people mentioned combating gypsy moths, but most woodland owners in that part of Pennsylvania seemed most concerned with removing invasive plants that affect the character of the woods. Development pressure on the land is high in that part of Pennsylvania, and woodland owners there were particularly concerned that keeping land wooded can be an expensive proposition.

Some of the landowners in La Plata County, Colorado, especially the Working the Land owners, held fairly large wooded acreages, interspersed with ranch or pasture land. Several of the landowners said they also use their land for cattle grazing. The discussion in Colorado was dominated by the twin concerns—beetle kill and drought, which have made the woods very susceptible to fire.

In north central North Carolina, much of the rural land is under cultivation and the woods tended to be in the wetlands. Many woodland owners rented their land to farmers, with the tenant farmer also tending the attached woods. North Carolina also has a tradition of timbering, and woodland owners there were much more affected by the decline of timber markets. The threat mentioned most often—flooding from beaver and nutria dams—was mentioned in the context of both woods and farmland. Finally, the wooded areas in that part of the state seem to be quite soggy and home to a variety of bugs, which makes them less attractive for hiking and walking in some seasons.



4. Key Takeaways

1. Most woodland owners want to be good stewards of their land. However, they have different conceptions of what that means.

Woodland owners believe that good stewardship is about respecting wooded land and protecting it so it can be passed to future generations. However, they have different ideas about how to do this. Two common patterns of ideas are presented here.

Tread Lightly

Some woodland owners—primarily Woodland Retreat owners—believe that most natural processes are healthy for woods and human use and impact are the main threats to woodlands. They love both trees and wild animals and want to protect them from humans. Some even believe they are holding woodland in stewardship *for* the animals. For this type of landowner, good stewardship is about minimizing human impacts in their woods to let the natural woodland ecology flourish. They often describe good stewardship in terms of what they don't do (e.g. not using pesticides or not permitting hunting on their land). They are also motivated to return their woods to a “native” or original state. Their concept of good stewardship therefore includes fighting invasives and promoting native flora and fauna. Finally, these woodland owners are very keen to re-forest land or restore damaged woods.

Intensive Use/Intensive Care

This minimalist philosophy can be contrasted with one that emphasizes intensive and thoughtful use and care of woods. For woodland owners that espouse this philosophy, woods are a resource to be used and tended, much like farmland or pastureland. They see woodland flora and fauna as amenities provided by woods for humans. As these woodland owners see it, both human agents and natural forces can work to improve or damage woods. A good steward uses woodland resources sustainably and reduces the impact of harmful natural processes through positive human agency. These woodland owners act more intensively on their land, shaping it to meet their goals and anticipating and mitigating potential natural threats.

Most of the woodland owners that subscribe to the intensive use/intensive care philosophy are Working the Land owners. This philosophy is also more in line with professional forestry, which is why professional foresters find it easier to reach and work with Working the Land owners.

2. For many landowners, woods are a part of a larger land holding which includes a home, pasture, farm, wetlands or other features. Their decisions about their woodland are made in the context of their overall land holding.

Most of the landowners that participated in this study discussed their woods in the context of their farm, pasture land, ranch or home. In terms of caring for the land, most Woodland Retreat owners tend to prioritize their yards, the wooded areas immediately surrounding their homes, and areas easily accessed by roads or trails. Some have never been in the rest of their woods. The biggest implication of this is that woodland owners may not be aware of problems or



opportunities in the remaining areas. Moreover, they may not have the time or energy to address problems that don't impact their use and enjoyment of the woods.

3. Most landowners see their land as a financial asset and a source of financial security. However, there are important differences in how Woodland Retreat owners and Working the Land owners perceive and use this financial asset.

Buying land is a financial decision and the fact that their land is a financial asset is never far from woodland owners' minds. The main difference between Woodland Retreat and Working the Land owners with regard to financial considerations is that Working the Land owners see their land as a "working asset" (i.e. they are actively seeking an ongoing return on their financial investment in the land), while Woodland Retreat owners see their land more as a "nest egg" (i.e. an investment that is not actively managed but can be pressed into use if needed).

Financial aspects of woodland ownership are top-of-mind for Working the Land owners who seek to generate income from their land even as they enjoy the amenities it provides. Their financial goals for their land guide their decisions about what land to buy, and how much they invest in improving or protecting that asset.

The attention of Working the Land owners is often directed towards the parts of their land that generate some income. Often this is self-farmed or tenanted farmland, but it can also be land that is leased for hunting or generates income from timber. Working the Land owners carefully decide how and where to invest their time and energy so as to optimize the value they derive from their land. They will take action to protect their investments against threats and to make improvements that pay off in terms of improved income or land value. They also judge woodland actions in terms of their effects on other parts of their land holding. For example, they may choose not to spray herbicides in their woods if the chemicals will hurt their crops or water sources, or they may let farm animals forage in their woods.

Woodland Retreat owners don't mention financial gain as a reason for owning woods, but they do talk about property taxes, land value, and the steps they have taken to increase the value of their land. They tend to invest in improvements that will enhance the usability and recreational amenities provided by their woods. Their attention is usually directed towards the built or landscaped aspects of their land, such as the home, trails, roads, fishponds, etc., which, they believe, affect the aesthetic and recreational value of their property.

4. Woodland ownership goes hand in hand with a certain lifestyle and identity. Working the Land and Woodland Retreat owners invest in land because they espouse certain values and want that lifestyle.

All the landowners who participated in this study shared a love of green (undeveloped) space, appreciation for natural beauty, and affinity for a close-to-nature lifestyle. Many of them had grown up in rural environments and enjoyed hunting, fishing, hiking and other outdoor activities as children. Woods and nature are a deep part of their identity and embody certain



aspirational values. Even those woodland owners that don't spend a lot of time in their woods think of themselves as outdoorsy and nature-loving people. This is an important trait that Woodland Retreat and Working the Land owners share.

5. Legacy—both in terms of inheriting land and passing it on—is very important for woodland owners.

Most woodland owners want to pass both their land and the cultural values associated with land ownership to their children. This sentiment was especially strong among woodland owners who had inherited some or all of their land. They felt that they held this family land in stewardship for their heirs. Some of them had taken steps to ensure that the land would stay in the family for the foreseeable future. These steps included: willing the land to the child who would be the best steward; setting up a trust to prevent parcelization or sale; willing the land to their grandchildren; and ensuring income streams for good land management. A few landowners had used conservation easements to protect their land, but most were not familiar with this option.

The most important thing for most woodland owners is to pass their love of their land and their stewardship ethic to their children. Many of them said that they did not worry about their land because their children appreciated the woods and understood their stewardship responsibility. Others said they had not legally constrained their heirs in any way but they made sure that their children understood their wish to keep the land in the family.

Many woodland owners recognize their woods help define the character of their community and they are quite happy to share woodland amenities with their friends and neighbors. However, only a few woodland owners see their woods as a public good and feel responsible for preserving green space for future generations. Because they want to leave a lasting legacy for their community, these woodland owners are more likely to seek out conservation easements or other development restrictions on their land.

6. Landowners' level of interaction and use of woods varies based on type of land and type of landowner. However, most landowners use their woods for some type of recreation and many collect firewood. Many have harvested trees for a variety of reasons.

Both Working the Land and Woodland Retreat owners enjoy nature and appreciate the amenity values of their woods. There are, however, some differences in how much these two types of woodland owners interact with their woods and what benefits and amenities are important to them.

Working the Land owners have a more intimate knowledge of all features of their land, and they are seeking ways to maximize the use of these assets. Most of them hunt and fish in their woods and collect firewood for personal use or sale. Those who are physically able spend a considerable amount of time on woodland maintenance—pruning, thinning, clearing brush,



removing invasive plants, etc. If they have commercially valuable wood, they groom their stands and plan for timber sales. They are happy to lease their land for uses such as grazing or hunting. They are eager to tap government programs that offer financial benefits for woodland owners. Working the Land owners spend a lot of time and energy planning woodland use and improving their woodland.

Woodland Retreat owners value the woods more for their look and feel. Some don't venture into their woods much; for them, the main benefit of owning woodland is the privacy and view offered by the trees and the fact that a variety of animals and birds enjoy the woods. Other Woodland Retreat owners do use their woods for recreation, such as walking, wildlife watching, hunting or fishing and many take firewood from their land. Compared to Working the Land owners, Woodland Retreat owners typically do fewer types of activity in their woods and they tend to be lower-impact activities. Woodland Retreat owners also want to enjoy their time in the woods, rather than spend it to manage or tend their woods. Accordingly, they tend to use vendors to perform any needed woodland maintenance or landscaping projects.

7. Working the Land owners manage their woods more actively, intensively and systematically than Woodland Retreat owners.

Working the Land owners reported taking more management actions in their woods and had done so more systematically, with due thought to how these activities interact with each other to advance their goals for their woods. They also prioritize their woodland management activities and plan when and how they will do the work.

In part, this higher level of activity is dictated by their "intensive use/intensive care" management philosophy, and their wish to enhance the productivity and income potential of their woods. However, another important factor is that Working the Land owners have more knowledge, more confidence and better guidance; thus, they are in a better position to take action. Working the Land owners tend to be better connected with forestry and agricultural agencies and services, and have a more specific and realistic understanding of the threats and opportunities in their woodland. They are also more likely to have the time, knowledge, tools and confidence to take on woodland management activities themselves.

Woodland Retreat owners are less likely to know about or access these specialized networks and service providers. Their knowledge of woodland threats and opportunities tends to be more vague and general, and they may not know how to prioritize and address them the context of their own woods. Finally, they often lack the resources to take on threat mitigation projects themselves and hiring contractors to do woodland maintenance can be both expensive and challenging. As a result, most Woodland Retreat owners focus on battling the most visible and obvious threats (such as invasive plants), and often do so in an ad hoc way.



8. Woodland Retreat owners need timely guidance and ongoing support to take appropriate management actions.

Although most Woodland Retreat owners wish to be good stewards of the land, there are many barriers to their taking action. As mentioned before, lack of knowledge is an important barrier—some don't know what they don't know and others don't know who can answer their questions. Another equally important barrier is lack of familiarity and comfort with professional forestry. Woodland Retreat owners have a different stewardship philosophy than most foresters, and this cultural mismatch complicates the discussion and the relationship.

There is also a mismatch between their expectations and the services offered by foresters. Woodland Retreat owners typically approach foresters with questions about specific visible problems, such as a couple of large dying trees or a rampant weed. The forester, on the other hand, may want to address those issues briefly, but then direct the woodland owners' focus to longer-term woodland health concerns. He/she may even encourage the landowner to develop a stewardship plan. This conversation is analogous to what might happen when a diabetic patient who is unaware of his illness visits a doctor for help with a diabetes-related symptom such as a wound that doesn't heal. While the doctor wants to focus on long-term lifestyle changes and ongoing monitoring for diabetes management, the patient might get frustrated that the doctor is not paying adequate attention to his immediate problem.

Smart foresters know how to take advantage of all teachable moments by offering specific advice and then parlaying that into a discussion of long-term threats and how they are connected. But often Woodland Retreat owners are unable to act on the advice they get because they lack access to trusted resources and ongoing support and guidance to give them confidence and certainty. Some aspects of this support are:

- (a) Woodland Retreat owners need help in articulating their goals for their property. Many just say they want to keep it healthy or don't want anything to change. But this means different things to different people.
- (b) They need a specific and realistic understanding of the most pressing threats to their woods and the actions that will best address those threats. This means prioritizing activities so they don't get overwhelmed.
- (c) One of the main challenges faced by Woodland Retreat owners is finding trusted vendors to perform woodland maintenance. Because they have very little knowledge of the process, they are nervous that a vendor will damage their woods and/or cheat them.
- (d) Finally, Woodland Retreat owners need financial assistance to perform expensive woodland management projects. Most of these landowners do not expect to earn income from their woodland and many are likely to be averse to spending money on woodland improvement unless it enhances their enjoyment and use of their woods. Thus, helping Woodland Retreat owners to access funds for woodland maintenance projects could help spur them to action.



9. Current landowner assistance programs do not adequately meet the needs of woodland owners or their woods.

Current landowner assistance programs are only moderately effective. These programs do reduce the burden of management activities for woodland owners who are already doing them. However, they do not offer enough incentive to persuade more people to undertake more actions. Even those who had used cost-share programs said that once all the paperwork and the regulations are taken into account, using the program to perform an activity offers only a marginal financial benefit.

Use of cost-share programs is also low because they often support timber-related activities that are not relevant to the goals of many Woodland Retreat owners. These landowners want support for things like trail- and road-building, forest restoration, planting wildlife food plots, and control of invasive plants.

Woodland owners see tax abatement programs as more useful and relevant. Many of the landowners that participated in this study were enrolled in such programs and most appreciated the tax break. A few said that this extra support is important for them to be able to keep their land undeveloped.

10. Colorado landowners do worry about fire and many have taken some measures to protect their homes and woods. But few are able to address the threat systematically and effectively and most have learned to live with the risk of fire.

Thanks to drought and beetle kill, the threat of fire is high in Colorado. Woodland owners are well aware of this, and of the actions they can take to mitigate this threat, such as removing deadwood and building firebreaks and roads. However, landowners seem to feel that their actions are of limited efficacy, in part because they are not able to systematically clear and fire proof all their land, but also because their risk also depends on conditions on adjoining lands. Most woodland owners do their best to mitigate risks around their homes, but largely rely on luck and their local fire departments to keep their woods safe.



4. Detailed Findings

In this section, we present the findings for each section of the conversation. Participants' quotes are presented in italics to give the reader a flavor of the conversation.

Love of the Land

Across the board, the landowners who participated in these groups loved their land and were proud that they owned land. Many had wooded land attached to their farms or homes, and several had multiple parcels of land. They said that they feel lucky and proud to own (rapidly declining) green land. Most also felt a sense of responsibility for keeping it in good shape.

I just wrote I feel like I'm really—not special—fortunate. Fortunate to live in harmony with the beautiful place, nature and what it has to offer. (WRO, CO)

I couldn't even think of anything when you asked but then it popped into my mind because say it all the time--'What a beautiful spot. What a beautiful place to be.' (WRO, CO)

Pride. Pride. I mean, I've always felt like land was—ownership of land was very important. Whether you made income or not, just the fact that you had it and it was yours and it's a legacy that you can live and keep in your family for years and years and years. And so it was always a prideful thing for me. My daddy tried to preserve it and pass it on to us and I've tried to do the same thing he did in that way. (WRO, NC)

So for me the best part of owning our woodland is owning it. (WTL, PA)

Landowners (rather than Woodland Owners)

For many of the people who participated in these groups, woods comprised a portion of their total land acreage, which often included a home or pasture, farm or ranch land. Landowners think of their woods in this larger context and the attention and energy they are able to devote to maintaining their woods often depends on how much attention the rest of their land holdings need.

Actually the forest or the woods on our property, it was a nice benefit to have but the property we own is mostly for the pastureland. We grow hay and we raise and breed horses. The trees that are on the property are certainly of benefit—they provide nice breaking up the scenery and some shelter and privacy. (WRO, CO)



I guess I never considered myself a woodland owner, but more of an acreage owner. I mean, one of the requirements was there would be trees. For the privacy, the seclusion, but I didn't consider myself a woodland owner until actually I got the phone call like 'you're a woodland owner and you've been selected.' (WRO, CO)

Except in North Carolina, Woodland Retreat owners tended to own less wooded land than Working the Land owners. They were also more likely to own just one parcel of land, on which they lived. Many of them seem to devote most of their time and energy to landscaping and maintaining the land close to their home.

And I would say the garden—as far as the landscape—takes up like 80% of our time. We just use the woods to enjoy to walk through, hike. We have 45 minutes to the hill behind our house and we have great views so we do that a couple times a month. Maybe more than that. Just hiking right out our back door. But as far as maintenance on that—nothing. (WRO, CO)

But the nice thing about the treed part is it's basically self-maintaining. I really don't do anything but go out there and enjoy it. So there's very little effort to that. (WRO, NC)

Well, I'll share something that I thought was amusing. My wife and I bought the 35 acres—her family was more of a suburban family. And her father when he visited the first time he said 'I wouldn't like having all this land because how would you ever take care of it?' [GROUP LAUGHS] And I'm thinking it takes care of itself for the most part. (WRO, PA)

Working the Land owners tended to have somewhat larger parcels of land, and were also more likely to own multiple lots. They tend to see their land as a resource that can be put to multiple uses, such as pasture, farming or woods. Many Working the Land owners spoke of wanting to put their land to the best possible use. Often, the bulk of their land was given to farming or ranching. Many of them lease their land to farmers, ranchers or hunters, thereby deriving some regular income from the land.

I've got several pieces of property in the region. I have about 200 acres over by [location] along the [name] River. It's about half forested. And I have a person over there who does the farming on the property for the part that's agricultural. That's dry land. And I have about 100 acres, 120 acres I guess it is, down at the south end of Long Hollow. And it's about two-thirds forested. And I have a 40-acre piece within a subdivision that's pretty much all forested. Out on Long Hollow Three. And I have about 50 acres around my house where I live that's about half forested. (WTL, CO)



The wood ground that we are involved with was my grandfather's wood lot and he had a large farming operation. So he took timber off, he took firewood off of that and he used it for hunting as recreation. We've tried to extend that, continue it. (WTL, PA)

First of all, the land is very steep and very erodible. And whenever it's cropped as farmland we get a lot of washing. And it's very poor soil so the yields are not good. I don't really think that it should be in farmland. So I'm trying to convert it back to woodland, which it was originally. (WTL, PA)

Land Values

Financial Security

For many woodland owners, land is valuable for its own sake, apart from any benefits and amenities it provides. Even those who are never planning to sell their land or generate any income from it, see it as an asset that provides both a sense of accomplishment and a sense of security.

I just always felt that I wanted some land of value. The feeling of having value of a piece of property that's yours. (WRO, CO)

I consider our land a refuge and safe haven. And therefore it gives me a sense of security. (WRO, CO)

I'm a land junkie. I can't help myself. So that's probably why I own it. It probably comes from my background of not having it. (WTL, CO)

The financial value of their land was a more immediate, “top of mind” concern for Working the Land owners. First and foremost, they see their land as a source of current or potential income.

I've got two words. One is 'serenity' and the other is 'bank account.' So you put those together and figure it out. (WTL, NC)

Well, if everything goes good, [land is] an insurance policy. I mean, the way I look at it is the woodland is not something that I'm counting on every year for income to live off of. And when it comes time to sell it then [it's there]. (WTL, NC)

Well, in Nash County I guess I've got 300 or so acres of woodland. In various stages, from 8 to 25 acres. 70 or so percent in plantation pine. The remainder in combination pine and hardwood. I guess what I like about it is I don't worry a whole lot about it like I do the stock market. (WTL, NC)

Despite their emphasis on the financial aspect of land ownership, it would be a mistake to think that Working the Land owners have a purely utilitarian approach to woodland. Their connection



with their woods runs very deep; land ownership is an important part of their identity and lifestyle. Several Working the Land owners spoke very deeply and passionately about how owning woods enriches their lives.

So I just said land is more than just acreage or views but it is place, it's purpose, it's security, it's responsibility. We just have a remarkable piece of property. And I think of it in one sense is it helps define who we are. (WTL, CO)

Well, I grew up on a farm. I like land for the sake of land. And you'll find that 90% of the people I would say that are true farmers will say really the same thing. Land has an artificial value. People won't sell it because they like it. It's theirs. ... There's a feeling there. I have bought and sold a number of tracts and made a fair amount of money. I have retained the tracts that I like regardless of the money. (WTL, NC)

And it has been a good source of income for us. And so that is our primary interest. A second interest, of course, is recreation. My brother who lives in Pitt County lives nearby. His family loves to do target shooting and hunting and things like that.... Since those children were small they have walked the farm and played in the creek and all. (WTL, NC)

Just owning a piece of heaven. And being able to live in that environment. (WTL, CO)

Tranquility and Beauty

While financial security is also important for Woodland Retreat Owners, when asked what they value about owning woods, they are more likely to mention tranquility and beauty. For many Woodland Retreat owners, their woodland home is really a retreat away from the stress and hassles of their daily life, with the trees helping to create that sense of tranquil space.

To me nature in general—and especially my woods and all the animals that go with it—are very grounding. They sort of make me feel like I am part of the natural cycle. When I go out of that I feel ungrounded and nervous. So I feel like I belong to the world when I'm in the woods and I don't belong to the world when I'm out of the woods. (WRO, PA)

Peace. I like to go when the wind's blowing and how the trees and everything—it's just peaceful and it's just—tranquil and I really enjoy it. (WRO, NC)

You can park your car in the garage, put that door down and walk out in the edge of that woods—and I mean you forget any kind of problems that you had. The stress—it's almost like it goes whoosh. It is just the most wonderful feeling. It's like when you're a little kid and things have not gone well for you and your



mom picks you up and puts you in her lap and she says 'it's okay, honey. Everything's gonna be fine. Mom will take care of it.' (WRO, NC)

And for me, having to work in town in public education with all the hassles with that—as I'm driving home thinking about my place the phrase that comes to my mind is 'ah, home sweet home. Space away from the hassles and stress.' (WRO, CO)

Privacy

Woodland owners tend to be independent people who value their privacy. This value is stated most directly by Woodland Retreat owners, and comes up almost immediately when asked what they like about living in the woods.

I think I like the most about our woodland is it gives us a buffer and kind of creates a secluded area on our property that we can enjoy. (WRO, CO)

Well, we really enjoy the isolation I think a lot. Being away from a lot of other people. But also just being in the beauty of the woods and being able to enjoy every single sunset and everything about it. (WRO, PA)

We like both acreage and trees. Enough acreage so that we're not—we can play music loud, we can walk around naked—whatever we want to do. (WRO, CO)

Working the Land owners also value their privacy, but they rarely mention privacy as a reason for owning woods.

Nature

Most woodland owners love nature. However, there are important differences in how Working the Land owners and Woodland Retreat owners relate to trees and wildlife.

Many Woodland Retreat owners in our groups said they own woodland to preserve green space or wildlife habitat. They think of their woods as a sanctuary for wild animals, a natural place set apart from the outside world. To this group, woods are valuable and beautiful places and do not need to provide any amenities and benefits to humans. Even if they never go in their woods, knowing the woods are there for wildlife and the ecosystem makes them feel happy.

And I'd say the thing I enjoy most about my property is it's a haven for the wildlife. A really true haven for them. (WRO, CO)

I want to let it sit right there and let it be a farm—or I should say a place for and the animals to live. So that I can appreciate those. Because once they're gone, the forest is cut, they'll leave. I mean, they won't have anywhere to go. (WRO, NC)



I just like living in the woods. The fact that I can see bear, deer, turkey, grouse, you know, anything looking out a window any day. (WRO, PA)

While Working the Land owners also want wildlife in their woods, few would say that they maintain their woods *for* wildlife. They are more interested in balancing multiple features and amenities of their woods.

[I am interested in] the best ways to manage this so that you get the biggest yield—wood production—for the acreage and for the type of [forest]. But I would also be interested in topics that relate to wildlife habitats and things like that. ... And the yearly migrations of duck and geese and things like that—often times those kinds of birds will come and settle in briefly and then move on. I think it would be fascinating to know what can be done to encourage wildlife habitat in the area. (WTL, NC)

Heritage

Woodland owners tend to be people who grew up on woods or farms, or at least spend considerable time on them. More than half the study participants had inherited their wooded land and this land evoked fond childhood memories. In many cases, the land also represented their connection to their family and roots.

And I think the best thing about owning woodland is that's the type of environment I grew up in. And to me that's just what home is. (WRO, PA)

I just wrote that that's where I grew up—my brothers and sisters, my dad, my mom, everybody was there, you know. So I can walk around, I can remember things that happened 70 years ago. (WRO, CO)

The word I think of is 'history.' It's her family. And her family's land. And that path we live on is referred to in deeds from the 18th century as the Plantation Road. So it's been in her mama's family for—when we say generations—centuries. And there's just some history there. (WRO, NC)

And because it is a legacy. It provided a good income and livelihood for my grandfather. My father used to say that it sent his kids to college, put braces on their teeth and did all those kinds of things. And it's doing that now. ... And I hope that it will continue to be an income-producing entity for another generation. (WTL, NC)



Uses of Woodland

The types of benefits that landowners derive from their woods vary by location, parcel size, and the type of land. There were also differences in how Woodland Retreat Owners and Working the Land owners use their woods. In general, Working the Land owners are more oriented towards productive uses such as hunting, firewood, fishing, and harvesting. Woodland Retreat owners are more likely to mention non-productive uses, including activities such as hiking or bird watching and amenities such as privacy and beauty.

Woodland Retreat Owners

Woodland Retreat Owners vary widely with respect to how much they interact with their woods. For some, their woods are simply a screen, affording privacy and sound absorption for their home sites. This was particular true of woodland owners we talked with in North Carolina. In that part of the state, a lot of wooded land lies in swamps or wetlands. Those landowners said they love looking at their woods, but spend most of their time in their yard and/or in easily accessible parts of their woods.

It's just nice and secluded. We don't really use it. (WRO, NC)

[Time spent in woods?] Probably not that much to tell you the truth. Only because it's somewhat wet. And when we have rain like this you couldn't get on it if you tried. ... So the actual enjoyment of it is just from a distance. (WRO, NC)

In the woods? Oh, I don't spend all that much time IN the woods. (WRO, NC)

Other Woodland Retreat owners walk and ride in their woods quite frequently, often to view or hunt wildlife. Some do hobby restoration projects or small scale farming on their land.

And my favorite area is out by the little river 'cause that's the wooded area and that's where it's the most natural. And there's lots of large trees, legacy trees I guess you'd call them. I like going out there. I like looking for fossils and petrified wood. (WRO, NC)

I think I'm very fortunate to have that property and to be able to go out in the back yard. My wife has her two horses, which she can see from the house. And to be able to go out there and I can fly model airplanes in the field or I can put a canoe in the river and I can go fishing. And I can do all kinds of things that my neighbors don't get to do—unless I invite them over. (WRO, NC)

I wrote being able to hike or ride horses with privacy and knowing I can improve and be a good steward to the land. I enjoy the work. (WRO, CO)



Oh, we're certainly in the trees. The house is situated among trees. I frequently will walk through the woods. The horses, they sometimes have access to them. And that's about it though. (WRO, CO)

The most common practical use that Woodland Retreat owners make of their woodland is collecting firewood. This was an important benefit for many landowners in this group.

We also heat with wood so we're always looking—it's like having gold bricks standing there. 'Oh yeah, there's one. There's one.' My husband knows where every dead tree is. (WRO, PA)

I also heat with wood so it's a two-edged sword with the oaks dying. They're dying and then I look at it and the next thought I think is well, that'll make a nice tree to keep me warm. But I'd rather see more live ones than dead ones, obviously. (WRO, PA)

Working the Land Owners

A distinguishing feature of Working the Land owners is their high level of interaction with their woods. They are best characterized as multiple use owners. They like to get the most value from their woods in terms of recreational pursuits, income generation and personal use products like firewood and meat.

Many Working the Land owners hunt, fish and hike in their woods. Most collect and use firewood. Most would like to harvest trees for commercial use. Where possible, Working the Land owners generate income from their land by leasing it for activities such as cattle grazing or hunting. They are also more aware of tax abatement programs and other opportunities through which their woodland can be used to improve their overall financial situation.

Well, you know, beyond just owning land I truly enjoy wildlife. And we try to make a dollar—we do some leasing. (WTL, CO)

Part of what I enjoy is seeing—he's kept paths mowed throughout that area. And being able to have some of the neighbors walk their dogs and fly their kites and go snowshoeing and use that. (WTL, PA)

And frequently I'll go and I'll find a tree that fits my woodworking needs and I'll take some pieces off of it. ... I'll burn a lot of [the dead wood] for firewood myself. And anything that looks workable I'll take and it's just a hobby of mine. And the property over by [location] I've used for hunting. I will allow a few other people to hunt on there with permission. And it's got fishing rights, too along the river. (WTL, CO)



Working the Land owners also spend a greater proportion of their time in exploring, maintaining and managing their woodland. They know their land well and are familiar with its boundaries and features. They realize that maintaining woods is hard work. Many enjoy doing this work and seeing the fruits of their labor.

Six yeas ago we planted most of these trees—well, we had them planted. And so it's been a great joy for me to see them grow and prosper. ... And I enjoy getting out there and trimming the trees. ... There's a lot of maintenance in the first part of growing these trees. And I enjoy getting out seeing the progress. Thinking, boy, we did that six years ago, look at it now. (WTL, PA)

I get to see the change. Especially after the fire. Where places were totally burnt out or, you know, different stages of the fire that I've gotten to work on and rehabilitate. And now I'm seeing trees that were once 6 inches tall are 4 feet and 5 feet tall now. (WTL, CO)

Working the Land owners' ability to tend the woods depends on how much land they own and their physical ability. Some elderly landowners admitted that they are now less able to work in their woods or monitor them as closely as they'd like. Working the Land owners who have multiple lots of land and/or lease land to tenant farmers spend less time on their land and have a less intimate knowledge of some parcels. However, they do drive by their land regularly and work actively with their tenants on decisions about land management and use.

My wife, she is familiar with all the land. She doesn't walk on it because she's not physically able. She's a recovering breast cancer patient for about three years now. Before I had my open-heart surgery I did more walking and stuff in the woods and checking it out. The man that I depend on to tell me when the trees are ready—sometimes I'm able to walk with him. But no set time do I spend on it. (WTL, NC)

Limited to the walking. Most of our woods from where it is we can drive on paths or around the edge of the fields and get a bird's eye view of it. But when we're buying land—I've never bought a piece of land that I didn't walk the boundary of to check on to make sure I knew where it was and stuff. And of course, when you're doing that you're seeing what you've got at the back of a hundred acres of woods that you can't see from the field. (WTL, NC)

Worries and Concerns

For many landowners, trespassing, littering, illegal logging and hunting are immediate and real concerns regarding their woods. Landowners in all groups were also aware of a variety of pests, diseases and invasive plants that can damage trees. In Colorado, beetles and fire were



identified as the primary threats to wooded land. In North Carolina, landowners mentioned flooding from beaver and nutria activity. And in Pennsylvania, woodland owners mentioned battling gypsy moths and a wide variety of invasive plant species.

And one problem that we're really having now is beavers. Damning up the streams and just backing water up and—I mean, there's no way to get rid of them. (WTL, NC)

And my biggest worry – first thing is fire – and then getting rid of all the dead wood from beetle kill. Trying to take care of that. It's kind of overwhelming. (WRO, CO)

I'm very concerned. I've lost dozens of beautiful ash trees. And I have some really large hemlock and already some of the younger ones are infested. (WRO, PA)

Woodland owners were also very concerned about what happens on adjoining lands (e.g. logging, fire, etc.), because this affects the risk level for their woods as well as the amenities they provide.

The land behind our land was purchased. I think they were going to log that. And other than what residual damage can happen in the process—knocking other trees down—not really. (WRO, NC)

Part of our land shares a boundary with the Bureau of Reclamation mitigation land that they bought for the Animus La Plata project. And so that's 5000 acres of land that I can comfortably say gets no management right now. And so a fire could start down there and I'd be had right now. (WTL, CO)

There were some differences in the worries and concerns expressed by Working the Land and WRO owners. These are described below.

Woodland Retreat Owners

Woodland Retreat owners' concerns for their woods tend to focus on observed changes in specific features of their woods. Many Woodland Retreat owners expressed concern for specific dead or dying tree species or the decline of certain animal and bird populations. A few had noticed nothing amiss in their woods and therefore had no worries or concerns. Many of them also added that they do not know how to mitigate these threats.

There's trees that are hollow. Very large trees. So I suspect some of them will be falling over. And then it seems like my oak trees are dying. I can't figure out why the oak trees in particular are having problems. I've got pine trees, which



seem to have bugs. So trying to trouble-shoot what the problems are and figure out how to solve them. (WRO, PA)

[Any concerns?] Not really. It floods a little bit out in the field. I wish there was something we could do about that. But it's not that big a deal. (WRO, NC)

But the concern is similar to everyone here—is that I would like to preserve what I have for a number of reasons. ... But I'm not sure that my knowledge and that I'm capable to do the next right thing to preserve it as well as perhaps I could. And then the other flip side of that is all the diseases and gypsy moths. So it's actually sort of scary. (WRO, PA)

A few Woodland Retreat owners related their concerns for their woodland to larger environmental concerns. Some mentioned that their biggest concern for their woods is the declining value of nature in the popular culture.

I also am worried because it seems like the value of these lands is decreasing in the public eye. Everybody's so concerned about themselves and where to go to buy the next greatest thing and they don't care if the woods disappear. They aren't even aware of that. (WRO, PA)

My biggest concern is fracking. Really what it's doing to our water table, what it's doing to our environment is a major concern to me. (WRO, PA)

Working the Land

Working the Land owners tended to take a more systemic view of threats that can compromise the overall health and productivity of their land. They were conscious of the interrelationships among trees, plants, wildlife, and soil and water quality in their woods, and of the relationship between their wooded land and adjoining farm or ranch land.

And when I think of concerns, there's a lot of hemlock on the property and this hemlock algae now is causing a lot of those to die. And of course that protects the water—there's some drainage channels on it. (WTL, PA)

Working the Land owners were also more likely than Woodland Retreat owners to anticipate threats like fire and pests that can destroy vast tracts of land, and to directly relate this damage to a decline in their land value. Not surprisingly, more Working the Land owners than Woodland Retreat owners said they have taken preventive measures to mitigate these threats.

And I think the taking care of—and I guess planting and caring would kinda do that—but to go the extra step to preventative—is that the right word? Preventative maintenance? (WTL, PA)



A few Working the Land owners also mentioned that they were concerned about the collapse of wood markets and the affordability of keeping and tending woods, especially when their land transfers to the next generation.

I don't like the pine beetles and I've had that experience. I don't like the ice storms of 2002, which just about ruined me. ... I do not like the fact that I have very limited places to sell my wood. (WTL, NC)

I have two sales of ponderosa pine that brought in—one was a hundred dollars per thousand board feet and the other was 125. Now three dollars per board foot. That's not right. Three dollars per thousand. It's just nothing. You give it away. (WTL, CO)

Stewardship

At the most basic level, good stewardship means respecting and protecting the land. Virtually all landowners subscribed to these ideals, as expressed in the following exchange.

*[Participant A: There's a certain amount of respect that the land deserves.
Participant B: And responsibility to care for it.
Participant C: If those don't mean anything to you, you might as well live in town.] (Woodland Retreat owners, CO)*

Another expression of good stewardship was landowners' wish to leave the land in better shape than when they acquired it. However, what that means in practical terms varies for different landowners, depending on their goals and their philosophy of land use.

I believe that a good steward in my mind is somebody who property takes care of the land. And so it does boil down to the definition of taking good care of the land. (WRO, CO)

To me if you are a good steward and show respect then you leave it better than it was when you first acquired. For example—depending on your goals. If your goals are to mitigate fire or to create habitat for wildlife, as you show respect for it you improve, you know, toward whatever your goals are. (WRO, CO)

So I think from my own perspective, I've been called a 'tree hugger' and a 'pond lover.' But I think from my perspective, I think the land needs to be left in better shape than I got it. And some of the stuff that I bought was in pretty poor shape. (WTL, NC)



The differences in landowners' views of good stewardship appeared to stem from their positions on two dimensions:

Human Vs. Nature-centered: For some landowners, good stewardship is about maintaining the value and use of land for future generations, whether it is their direct heirs or the human community in general. For other landowners, good stewardship is about conserving woods for their own sake or for wildlife.

Minimalist vs. Active: Some woodland owners see most natural processes as healthy for woods, and feel that human intervention is likely to damage them. For them, stewardship simply means minimal intervention, and letting natural processes do their work to keep woods healthy.

For others, stewardship is an active concept—it means tending the land to keep it healthy or to alter it in line with certain goals. These landowners believe that human agency is needed to protect woods from both natural and man-made threats. Many also believe that good stewards should actively shape their woods to meet their aesthetic, amenity or use goals.

Although there are exceptions to this generalization, Woodland Retreat Owners tend towards a more passive approach to stewardship, while Working the Land owners tend to manage land more actively. Woodland Retreat owners are also more likely to think of stewardship as prioritizing natural beauty and wildlife concerns over human use of woods, while Working the Land owners believe that good stewardship is about sustainable use of woodland resources by humans. The views of these two types of landowners are unpacked in more detail below.

Woodland Retreat Owners: “Tread Lightly”

Woodland Retreat Owners tend to have a more passive view of stewardship. They believe that woods should be left to natural processes, with minimal intervention from humans. Many of them described good stewardship in terms of what they *don't* do. They said that good stewardship is about not degrading the land (e.g. by using pesticides), not interfering with the wildlife, not cutting any more trees than necessary, and minimizing human impact on their woods.

To me it means organic. We don't spray. We don't do all of the things to our land that get into the water table. (WRO, PA)

And I think part of it's keeping a junky forest. We have—ours isn't cleaned up and neat. It has dead trees for the pileated woodpeckers and brush piles for the bears. Keeping it messy. (WRO, PA)

And what we try to do also is—I think everybody tries to not bother the animals during calving season, you know, when they're first born. So good steward



means, you know, don't encroach your type of lifestyle on where the animals are living. (WRO, CO)

Well, I look for diversity because I know that's healthy. So I'm well aware of all the tree species on my 35 acres. So I would not make a decision that would eliminate a species when I only have one or two of them. (WRO, PA)

A few Woodland Retreat owners take a more goal-oriented approach driven by environmental conservation values. They may undertake projects devoted to restoring native species, reforestation of timbered land or improving wildlife habitat.

And I feel that I've been given a responsibility as a steward for future generations for my woods. And so I'm concerned that the diversity is disappearing. So I am concerned about all these trees disappearing because it's sort of changing the look of the woods. And things come in that don't belong there. You know, we have infestations by foreign insects, foreign plants, foreign everything. And yes, it's a progression but it's one that's a little alarming to me. (WRO, PA)

I would love to see it cleaned up and re-seeded. See, when people cut the timber—they had owned the timber rights when we bought the farm. ... And they went in there and just—where they never cleaned up anything or re-seeded.

Working the Land Owners: Stewardship = Intensive Use + Intensive Care

For most Working the Land owners, stewardship is an active concept—it means tending the land to keep it healthy or shape it to meet certain goals. And because Working the Land owners tend to see woods as a resource to be used and enjoyed by humans, one of their main stewardship goals is to maintain the value and potential uses of land for future generations. That said, this group takes a broad and long-term view of the values provided by woodland. To them, good stewardship includes protecting *all* the amenities provided by healthy woods—such as wildlife, clean water, and recreational opportunities—from all threats, both human and natural.

I think that it's finding the balance between fire mitigation, healthy woods and wildlife. And just creating that balance. Also thinking more about like four generations ahead. You know, what can we do now that's going to create a good environment for future generations on this property? (WTL, CO)

I think another step in the planning is thinking in terms of what is natural to this land. That we're planting the kinds of trees that belong there, that were there originally, that are native. Part of that is so that it does not—and what works for this soil type and for the climate that we have. So that we're not having to add a lot of extra chemicals and sprays and so on to make it work. (WTL, PA)



Well, taking care of it. Just so we preserve our forestland in America... When you're tree farming and you're cutting trees for saw law logs you have to keep in mind that you may be destroying small wildlife habitat. Or even larger wildlife habitat. And in trimming up the limbs for fire mitigation, well, you're also opening it up so you don't have the--the cover for the larger wildlife. But oh my gosh, to me, just taking care of the land. Public view as I drive by. For our children and their future of owning land. (WTL, CO)

Many Working the Land owners seek ways to maximize their current use of the land—including generating some income from it—without compromising the quality, productivity and beauty of the land.

I'm a use guy. And so I want to see products. I want to see a buck really. And literally generate some kind of income. ... And if I can do that while I'm doing things that work on the appearance and the kind of general condition of the land... But the appearance and then just the condition, I think, has to have something to do with good stewardship. And then—without using the word 'fire'--somehow planning my actions, my strategy for income and then this wildlife habitat—and then trying to do some practices that I think make it a little less vulnerable maybe to the natural processes. (WTL, CO)

Many Working the Land owners think systematically about their woods, anticipate and combat threats, and plan ahead to shape their woods. They know that good woodland stewardship is hard work.

But when I read articles about wood lot management I'm thinking I'm not really taking full advantage of my mountain ground. Because again, as I'm losing trees I should be replacing them. ... And if there's trees that are—not so much those big oaks I talked about—but some of those other junky trees—you know, I'm thinking maybe they oughta be getting outta there and I could be planting something that would be, you know, begin the forestation process for the next forty years. (WTL, PA)

The thing about this is that it's so much hard labor manual labor work. Or it's expensive work. And I think for a lot of people that's a major property, keeping the property and cutting all the dead pinion pines off your property. How much work is that gonna be? (WTL, CO)

These differences in how people orient to their woods reflect deep-seated beliefs about the relationship between man and nature. Although these beliefs are difficult to change, people can be moved from passive to active approaches to woodland management through their experiences or in response to specific threats, as illustrated in these quotes:



And along about that time—well, later on when we had the fire out south of town—Black Ridge fire out there. And I was trying to learn more about the forest and fires. And I was invited by the Colorado State Forest Service to go for a visit up there and take a look at it. And at that time I began to learn that there's much more to a forest than just letting it grow. That it was too dense and too deep, too many insects et cetera. So I began to think, wow, there's a lot more to taking care of the forest than just living in it. (WTL, CO)

But I mean [beetle infestation] wasn't my original concern or even thought to some extent. Because when you bought healthy land you weren't thinking intensely about that. And you weren't worried seriously about fire. But now with this change it's like you may need some help. And everybody kinda gets to enjoy it but it's kind of your responsibility to ... get things more back under control to where things are more healthy again. (WTL, CO)

Passing On Stewardship Values

Many woodland owners, both Working the Land and Woodland Retreat owners, said that good land stewardship includes inculcating an appreciation of land and nature in the community and among their heirs. One person also mentioned that advocating for better policies to protect woodland and support private landowners is part of her stewardship ethic.

And we teach [our children] an appreciation for the land and the natural beauty and the wildlife and all those things. And our kids are essentially grown up now but they I think all appreciate the outdoors. At varying levels. But, you know, I think that's really an important part of stewardship is helping the next generations learn to appreciate it, understand it. (WTL, PA)

I think another thing is to try to share your enjoyment of the forest with others. We've done that with our sons and we're doing it with our grandchildren. And trying to keep it going, the enjoyment and the value of keeping it the way it is. And the excitement of it and the adventure of it. (WRO, PA)

Well, it's important to me to pass it on to my family. I mean, it's land that's been in our family for several generation and I want to pass it on to my kids and I want them to see the value of it. (WRO, NC)

Actions Taken

After discussing the concept of good stewardship, landowners were asked to say what stewardship actions or activities they had taken or considered taking on their land. The moderator explained that these could be actions that would improve the health or value of their land, or enhance their use and enjoyment of the land.



Woodland Retreat Owners

In keeping with their “tread lightly” philosophy, Woodland Retreat owners mentioned fewer land management actions than Working the Land owners. They were most likely to mention actions that enhance the aesthetic value of their woods, protect their woods from damage by human activity, and/or invite more wildlife on their property. These actions included: Battling invasive plants; building roads, trails and ditches for fire and erosion control; maintaining defensible space around the house; clearing the land of brush and deadwood; simple habitat improvement projects like maintaining brush piles and planting native grasses; and posting, fencing or gating their land to protect it from incursions. Very few Woodland Retreat owners mentioned stand improvement or preventive actions to combat pests or diseases.

We haven't done that much on our property but our philosophy's sort of pretty much to leave it as nature intended it to be... We have removed dead wood and debris. ... And the opposite—I've managed to fence out the livestock in areas. ... It's to keep too many animals out of the trees. And I think just there's the tread lightly mentality that we've really pushed that a lot as well. We try not to tear up the land. (WRO, CO)

I think a lot of the mountainous areas where you have bridges you find out that there are four-wheelers run and you get the run-off. First thing you know you've got ravines from just people having enjoyment. They think it's enjoyment but you have to take care of that part of it. We put breakers in the trails to run the water off instead of down the trail. (WRO, PA)

I'm actually farming my woodland. ... But it's wonderful to be able to walk in a forest and not have the briars and all the undergrowth and all those sort of thing. It's just wonderful. I mean, it's getting back to nature. I mean, you know, you just tend to forget things. (WRO, NC)

I'm thinking that I don't hear much talk about the idea of respect for the land or stewardship. I do hear a fair amount of talk—a lot of talk, I guess—about enhancing the value of the land. And so in my own case I've had fire mitigation work done twice. A, to protect the house, and B, to enhance the value. (WRO, CO)

Many Woodland Retreat owners have had no contact with forestry professionals and they have little knowledge of the specific threats or opportunities in their woods. They tend to rely on what they know about landscaping and gardening, or get information from local gardening stores. This lack of knowledge inhibits them from taking actions that might be most needed to protect their woods. Many Woodland Retreat owners realize that they are working in the dark. They remain uncertain about the impact of their actions and shy away from large projects and big decisions that might be irreversible.



I'm trying to get a lot of the honeysuckles out of there. Because nothing was growing except the honeysuckles. And again, I'm flipping the coin and I'm hoping I'm doing a positive thing as opposed to a negative thing. (WRO, PA)

And the other thing that I'm doing is I go through the forest—I can't cover all the acreage, we have too much—but what I'll do is I'll go through it periodically—trees that I know are dead and dying I'll try to take them out. I don't know if that does any good or not but I don't think it can do any harm. Some of those may already be infected with God only knows what kind of disease. So I try to remove those. Also try to remove multi-stem trees. (WRO, PA)

I've worked on drainage in the area. There used to be cows on the property and where the cows walked there's ditches. And been working for years now to try and make it drain properly. And then there's the occasional trees that need help. So prune them and fertilize them. And if the insects seem too bad—I don't know if I'm doing it right but I'm just guessing.... I go to the local place where they sell the equipment and insecticides and fertilizers and stuff and just generally ask them. (WRO, NC)

I think one reason we haven't done something is we don't know if it is the best thing to do on a global scale. What trees are the right trees to plant? What are the implications of spraying for that? (WRO, PA)

Many Woodland Retreat owners also said they had planted trees or wished to plant more trees on their land. They often added that they lack the knowledge to identify appropriate trees for their land, and the resources to buy and plant saplings. In one group, older landowners discussed that, in the past, companies such as Weyerhaeuser had supported reforestation, especially after harvests. Now that this support is gone, many landowners do not have the means to replant after logging or tree damage.

I think what I'd like to do is continue to get rid of more of the invasive species. And also get into replanting. Because when I get rid of the bushes I end up with grass. And I don't like cutting grass. So the next thing would be to start planting some trees. (WRO, PA)

And sometimes I have crazy idea I'm going to plant a whole bunch of trees—both native, imported from other countries. (WRO, PA)

I wrote just 'continue to plant trees in unused areas.' (WRO, CO)



Working the Land

Working the Land owners mentioned all the stewardship actions that Woodland Retreat owners had mentioned, and more. Apart from differences in stewardship philosophy, these differences in activity are related to differences in their knowledge levels and their goals for their woods.

Because they aim to maximize woodland productivity, almost all Working the Land owners mentioned thinning or other stand improvement actions, followed by re-seeding or other actions to promote regeneration.

Another thing about the beetle control—and it goes along with the fire mitigation—is thinning the forest. If the forest is too thick there's a lot of unhealthy trees and then that's what attract the beetles. Where thin out the trees so that the canopy is not touching each other, it helps. (WTL, CO)

One of the things that we do—and I do think it's worthwhile—is the year after we plant we come in and spray to kill the hardwoods and so forth because we're principally trying to grow pine trees. And so we do a spraying. I don't know if you've ever done that or not but it's a wonderful thing. (WTL, NC)

Well, we did the stewardship plan after we had done some thinning. We had cut some mature trees for lumber. And we felt we needed to go back and replace them. And so at that point we talked to a forester about the thing and he said well, we ought to do a stewardship plan and look at what would be best to grow at different sections. (WTL, PA)

I deal with the North Carolina Forestry Service, the environmental groups, and the conservation groups. And we practice good forestry. We also practice good soil erosion on the open land. We plant trees on land that has been cleared but the slope is really too great to plant. (WTL, NC)

Working the Land owners also tend to be more systematic and informed about woodland management activities. They understand how forestry activities can build on each other to accomplish multiple goals. Working the Land owners were much more likely than Woodland Retreat owners to implement “projects” on their land and experiment with different techniques (like integrated pest management or using pheromones to combat pests).

We completed a forest stewardship plan for our property. Had a forester advise on what to do to improve it. We had efforts to control invasives. Mainly in our case it was ferns and striped maple. And we've done some wildlife habitat things like food plots and planting some shrubs that provide food for wildlife. And also done some shelters—stacked logs different directions to make shelters for them. And we've planted replacement trees. (WTL, PA)



I think if we would have had the forestry plan before we did some timbering and controlled those invasives then—the timbering allowed them a little time to get a start on things—we'd have been way better off. If somebody's going to some timbering they should be advised to do their treatment of the invasives first.
(WTL, PA)

I participate in the forest agricultural program and we harvest trees for saw wood. ... And then we harvest trees for firewood. We thin the forest—cut fire lanes both within the property and around the property just for fire mitigation... We work to develop small wildlife habitat in the midst of all of this cleaning.
(WTL, CO)

Attitudes towards Selected Management Activities

Consulting with a forester

Almost all the Working the Land owners that participated in our groups had sought advice from a forester. They knew about the services provided by local natural resource agencies, and many were on first-name terms with their local service forester. Because these landowners are trying to optimize the value they get from their woods, they have a lot of questions for service foresters.

But I have people that come to me—several professionals that come. One of them's a weed specialist, one of them is a forestry specialist. One of them is just making sure that I'm doing what I'm supposed to be doing and not cutting down the trees and things like that. So I have people that come to me several times through the year. And they always give me good advice. I'd be lost without them. (WTL, PA)

Yes, I have a forester ... And he has done inventories of the property to determine what types of trees, how many trees I have. And then he gives me advice on whether to plant or whether to harvest or thin. And the fire lanes, he marked what he called a shaded fire lane around the property so you just don't denude it.
(WTL, CO)

In my situation I had a forester come in when we were getting ready to build and trying to determine the best way to put the road in and maximize the recovery of what trees had to be removed for commercial logging purposes. And at the same



time eliminate a lot of the maple. Because again, the property had been heavily forested years ago and that just generates all the invasive stuff. (WTL, PA)

The state forester come in periodically every couple years and walks our property with us. Talks to us about how we're progressing with our plan. Well, so I think it's beneficial. (WTL, PA)

I found that in doing myself I was not nearly as smart as I thought I was. (WTL, NC)

Fewer Woodland Retreat owners had spoken with professional foresters. Some had contacted a government agency to request assistance for a specific problem, such as a diseased tree or depleted pond. In a few cases, they had requested help with decisions regarding logging. In many cases, Woodland Retreat owners seemed to be dissatisfied with the service they received.

When we first moved there we had someone. But they didn't seem very knowledgeable. They were kind of hesitant to give us any kind of information. We probably should do it again and see if we could get somebody... (WRO, PA)

Any time I've ever tried that they say—we only have 17 acres so we're not a big place. (WRO, PA)

Well, I went to the Colorado State Forestry and I asked them--'cause we have pinion juniper—and they said they don't deal with that. (WRO, CO)

We did talk with some Woodland Retreat owners who have consulted foresters and work with them to manage their woods and prevent problems. In most cases these were people who knew a forester personally, and often they were women who sought help when they became primary decision-makers for their woodland.

The only good thing was though the guy was [my husband's] friend. He's a forester and stuff but he was his friend so he gave us a lot of good advice. (WRO, PA)

But the forester's a friend of mine. I grew up with him and went to school with him. ... And he came to me and he said 'I think you've got some timber that's ready to harvest and the market's right. You want me to check it out?' And I said 'sure, go ahead.' So that's pretty much how it was. (WRO, NC)

Overall, Woodland Retreat owners see less need for seeking professional advice regarding their woods. Many think their woods are fine as they are. Others see the value of making some improvements to their land, but don't have the time, energy or resources to undertake these



projects. A few said that foresters would not be interested in talking with them because their lots are too small or their trees have no commercial value.

Well, if you walk through our place it's pretty obvious what you can do with it. We don't need somebody else to come and tell us 'this is gonna make a park' when we can see it's gonna make a park. (WRO, CO)

We just don't have enough water to do what you really want to do out there where we are. (WRO, CO)

In part, these perceptions reflect reality. However, the most important reason why Woodland Retreat owners don't approach foresters is that they have very little knowledge of forestry services and they are not comfortable with accessing them. They don't know what the forestry profession can offer them; they don't know whom to trust; and they often feel that the language, culture and goals of forestry are not aligned with their needs and expectations. Learning how to navigate this world is a challenge for these landowners, and the benefits of taking on that challenge are not clear.

I didn't know what their services were. I thought they just went out looking for fires or sit up in them 200-foot-tall towers with binoculars looking for fires. I didn't know that they did other things. I mean, I knew the park rangers did, I didn't know the forester service. (WRO, NC)

But I suspect-- I lived in New Jersey for 35 years and came out here—and suspect there's just a helluva lot that I have no clue about. I'm not smart enough to know what questions I ought to be asking. (WRO, CO)

Well, I never thought of asking a forester for any advice in that respect. The fire-fighting unit people will come and they'll tell you ought to take that tree out because it's a fire hazard. But I had no idea that the forest service provided a service to private landowners. (WRO, CO)

The idea of finding the right person to give you advice. I mean, finding the right resource and being able to use that resource. Financially being able to use that resource and knowing that it's good information that you're getting. So finding the right resources and the right information in order to be a good steward is very important. (WRO, PA)

In two groups we specifically asked Woodland Retreat owners if they would be interested in having a forester walk their land with them to point out threats and opportunities. The majority of Woodland Retreat owners said they would enjoy this, and many mentioned specific areas in which they needed advice. Many Woodland Retreat owners do have goals and dreams for their woods, even if these are somewhat vague and unarticulated.



Well, that's the greatest joy, just walking through your own land and looking around. It's fun. (WRO, PA)

Like if I thought I wanted to improve my land for elk I would have no clue as to what needs to be done to improve it for elk. So that would be a big goal but I would actually appreciate someone telling me 'well, you know, you might want to think it a little bit and you want to remove this.' Or 'elk like this bush.' So that's sort of what I was thinking. (WRO, CO)

I just want to keep what I have healthy. And whether that be cutting, planting, whatever—I don't have the expertise to know what to do to keep it healthy and keep that mix. (WRO, PA)

I would really like some information about what to do to restore a forest, you know, trees. Not to sell them but just so it's a healthy—instead of sweet gum shrubs, cedar shrubs, like that. (WRO, NC)

Getting a written stewardship plan

Only a few of the woodland owners that we talked with had written stewardship plans. Most of them were Working the Land owners and participating in a government tax or cost-share program that required them to have one.

Even if they don't have written plans, many Working the Land owners have thought systematically about caring for their woods and may have the elements of a stewardship plan in their heads. They know their woods well and are aware of different assets and stands on their land. They know what care each part of the woods needs, and when that care needs to be provided. Many of them have a mental schedule for both seasonal management activities (like weeding and spraying) and longer-term projects like thinning and harvesting. They may not be able to accomplish all that they'd like, and their actions may not be aligned with a professional's recommendations, but they do have—or want to have—a plan of action.

I actually have talked to a forester a couple of times but we just haven't actually gotten that accomplished. And again, like I said, I want to replace where some of these trees have died. So my goal is to try to kind of create a bigger vision of where we want to go and then how we accomplish that. And I think a forester hopefully could help us identify that. Sort of just help us—maybe present some options to us. (WTL, PA)

It's not that [having a written plan] is not a good idea. We just haven't done it. ... I mean, for my brothers and me, if there's a tax advantage or if there's a financial advantage, that would be the greatest prompt of all. (WTL, NC)



I lost the game and so I've cut a little bit here and there. Although, again, a plan—even if you're working on an acre every year or a half an acre every year, I think it's still stewardship. You know, it's still something. It may not be, you know, woodland manager of the year but you're doing something. (WTL, CO)

So what I really have is I have an annual strategy—I'm just gonna call it that—that I put together. Sometime between now and about February every year I try to plan what am I trying to do and where am I going with this and that. (WTL, CO)

Well, as far as my plan, it's my plan. I didn't get—somebody didn't draw it. And it was just the amount of time that it takes for a tree to get big enough to think about harvesting and stuff. And the reason I did it is because me and my wife are 71, her sister's 66, and her husband just died. And so for all our land, for our children to know what to do with it. And when to do it. That's why we developed the plan. And it's nothing like specific. But it says like 'section A on this farm should be ready to be thinned by the year 2025' and stuff. (WTL, NC)

In contrast, many Woodland Retreat owners see no reason to plan activities in their woods. As mentioned before, most think their woods are fine as they are and don't realize their woods need regular maintenance and care. They try to deal with pests, invasive plants and other problems as they occur, with little awareness of preventive treatments and management strategies. Some Woodland Retreat owners have goals for their property, but little idea of how to go accomplish these “dreams”.

I haven't thought much about [a stewardship plan]. I really never did. Until things really started to die I really wasn't too concerned. Everything looked okay. (WRO, PA)

I wasn't aware of it and I don't know if I'd be interested in it. ... Since we don't have that much of a problem with what we have growing out there as far as we don't have the beetle problem—I'm not really sure what would be gained by having somebody come out. (WRO, CO)

I mean, out here there are a lot of pretty independent people. You do what you need to do. And I mean, if you can do it you do it. And so as far as the plan—we know what needs to be done on our place. We don't need to sit down and write out a plan. You know that tree's falling over and you have to go and cut it up, you know. So it just—I don't know, for us it just seems rather ridiculous. (WRO, CO)

In all groups, however, some of the participants saw the value of having written stewardship plans, if only to clarify the existing assets and value of their woods and to communicate threats and opportunities to future owners. For some Woodland Retreat owners, having a stewardship



was also valuable to help reduce the uncertainty that accompanies most of their woods-related decisions.

Well, in my case, like I said, I want to do some reforestation. But my plan may not be the right plan. Because as I was going to do—as others have discussed—buy a thousand or so trees. I know I'll probably lose 75% of those. You put in as many as you can and hope the deer and all the critters won't tear them down. But I don't know what mix of trees would be good. (WRO, PA)

It could be passed on. Even if you were to sell the property—if you didn't pass it onto your next generation of children or whatever—the next ownership—public, private, individual or group of corporate farms or whatever—if they could have that to integrate with their large corporate farm plan, stewardship of woodlands, that might would help keep it from being over-developed. (WRO, NC)

I think that would be helpful. Talking about in terms of foresting and other things, it would just help. And also this is family land—it's been in her family for generations and we want our children to have it. So something that they can follow as well to feel part of it. (WRO, NC)

That said, woodland owners, and Woodland Retreat owners in particular, may feel overwhelmed by the woodland management activities laid down in their plans. They are also sensitive to the limitations of their own woodland (e.g. small parcels, too much or too little water, etc.), and of the unpredictability of natural disasters, which can obviate any plans.

But it comes down to economics. When I have to pay taxes, when I have to send my children to school, the money I have goes to that. And we try with our resources to do as much in the forest but we don't have the government assistance that you're talking about. (WRO, PA)

I said no because my husband is sick and he doesn't need one more thing that he can't worry about. (WRO, PA)

I just want to say the best laid plans of mice and men. So you have all these steward programs and now we're being hit by death to three kinds of trees we mentioned. (WRO, PA)

Participating in a government program for woodland owners

Almost all of the Working the Land owners who participated in these discussions, and some of the Woodland Retreat owners, were enrolled in programs that offer tax advantages for woods or farmland. For many landowners, enrolling in these programs is a no-brainer because they often don't have to change their practices or land use to qualify. Those that weren't enrolled in



these programs were interested in learning more about them. A couple of landowners mentioned that they are Tree Farmers.

A lot of my incentive [for enrolling in the program] was monetary. Prior to getting the agricultural exemption—whether it's cattle farming or then trees was the new thing to me—the taxes would simply make it impossible for a family to own a place. (WTL, CO)

Fewer people had participated in cost share or other programs that commit landowners to taking certain actions, and most of them were Working the Land owners. Other Working the Land owners said they had looked into cost-share programs, but decided that the small financial incentive is not enough to justify the constraints and added bother of dealing with the government bureaucracy. Their concerns with these programs stemmed from uncertainty and lack of control. For many programs, funding levels are uncertain and you cannot be sure to get funds in a given year. Moreover, since Working the Land owners tend to do all the work on their land themselves, having to meet certain criteria or timelines can be problematic for them.

And so the last two times that we cut trees, when we applied for the re-seeding money they didn't have any left. But like you said, by the time you pay taxes on what you got and everything and you could pay for the re-seeding and count that as a tax write-off—and you really didn't come out much worse [without the cost share]. (WTL, NC)

And I've had so many years of working for the federal government that I'm just—and I have friends that are government employees—but I just don't want to do any more government programs, thank you. There's a string—there's like 60 strings every time you do some what looks to be like a good deal. (WTL, CO)

Well, I am 67 years old. And I re-seeded a small plot this past year. Do you really think that's gonna do me personally any good? It's not. And it takes money that I theoretically could have spent elsewhere had I chosen to do so. So most farmland is owned by older people. ... And therefore most of your re-seeding and everything is going to be done by older people. And my point I'm trying to make is there is just not enough incentive for the average person to do that. (WTL, NC)

The incentives to get involved are not worth the time that it takes and the hoops you have to jump through to get it. Because most of the time when you get involved in these programs it seems like to me that these programs want to tell you what you can do and what you can't do. (WTL, NC)

Cost share programs only work when they are aligned with actions landowners already want to take; they are insufficient to motivate landowners to take new or different actions. In addition to low awareness and less comfort with local forestry agencies, this mismatch of goals is a big reason for poor uptake of these programs among Woodland Retreat owners. These programs



are often not aligned with the kinds of things they want to do on their land. Many woodland owners, for example, want to plant trees on their land, but few cost-share programs support that activity.

And some of the land that I bought was cut over. And I'm concerned about that because as far as I'm aware of there are no programs for restoring that land. Or no information about how to do that. (WRO, NC)

One of the things I inquired into was the timber stand improvement. Because they had that as a free service. But you're not allowed to use the firewood. And so I just thought well, I'm not going to do that because I can improve my own forest and when I cut a tree down I'll use it for firewood instead of just letting it rot up. (WRO, PA)

Okay, I think we need some government program to help us. ... And if government is helping farmers to plant corn to make gasahol they can give us money to buy the seedlings. (WRO, PA)

Well, besides thinning out the trees, what other kind of programs are out there? (WRO, NC)

One idea that emerged during two of the WRO groups is that some woodland owners may be open to letting government agencies implement conservation programs on their land. Many Woodland Retreat owners just want to improve their land and they have few specific ideas for doing so. They would like to see conservation projects implemented on their land, as long as they don't have to bear the financial burden for doing so.

[The forester] talked me very hard. He said 'Frank, we're going to make a swamp there, 10 acres. You pay nothing. We will do it 100 percent. ... They will push you to do something really good for the environmental reason. ... And certain things they will even help you financially. Like if I agree with them that time, say 'I'm going to have that piece of swampland' I get it done for nothing. (WRO, PA)

If I could volunteer for the state to plant on my property I would do that... Yeah. Otherwise I'll sit there and go 'well, I'm happy with my property' and will make no effort to try and improve it because it's going to cost me time and effort and I've got enough other things to think about than trying to improve my property. But if they were aware that I was interested in it—like I could say 'I volunteer. (WRO, NC)

Finally, in every group, there were some people who simply did not want to enter into any arrangement with a government agency. In general, we found that this distrust is lower when people are familiar with their local state or extension agents. That personal relationship can go a long ways towards establishing the needed trust.



Maybe I look at it wrong, but always seems like that if somebody has a program they want you to get into you better read the small print real careful or you're gonna end up having your stuff tied up where you don't have any say-so over your land. So you're gonna have somebody in Raleigh or Washington or something that's telling you what you can do and what you can't do. (Working the Land, NC)

Harvesting trees

Harvesting trees is one of the most important decisions landowners make for their woods, and they are well aware of this. The landowners who participated in our research told both horror stories of logging jobs gone wrong and stories of how a good cut had allowed them to generate funds while preserving the health of their woods. Many reported that they have received postcards from loggers who would like to offer them a set amount for their woods, but most said that they are skeptical of these offers.

Most woodland owners do remove some trees from their woods, mainly for firewood, but also to build homes, barns, trails or roads. Many woodland owners, both Woodland Retreat owners and Working the Land owners, have had commercial harvests on their land, either to generate income or to clear land for other reasons. In Colorado, where the combination of beetle kill and drought has greatly increased risk of fire, woodland owners also remove trees to reduce fuel.

Well, the last that we sold a good amount of timber was financial reasons. The market was good and we had just bought this 400-acre farm. And I had my forester to appraise the timber before we bought it. He came back with the figure that it was worth. And so we bought the farm and then after about three or four years we needed money to help pay off the loan and stuff. And the woods was mature and ready to be sold and so we sold the part of it that was ready to help pay off the loan. (WTL, NC)

Well, the first [harvest] I guess is because my husband probably was making more land to tend. To have more cleared land. And the second time was because the bugs had gotten in it. (WTL, NC)

Well, several different [reasons to harvest]. I'm sure it's true of most people. One is mature trees. Two, is pine beetles. Three, ice storms. ... Well, I didn't give the money away, but the answer is no, it was not for financial reasons. Anybody who owns timberland around here for financial reasons needs to have his head examined. (WTL, NC)

Right now I think with the concerns about the amount of dead stuff on the property just finding people that are willing to go out there and at least respect your land and harvest the wood—you'll give it to them. (WTL, CO)



We actually built a small road to the barn and we had to remove a few trees to make that work and things along that. And every time it's a sad experience to cut those trees. They just don't seem like they need to be thinned. (WRO, CO)

Working the Land owners cut more trees for their own use and are more likely to plan for commercial harvests. In part, this is because harvests fit better with their philosophy of land use. But it is also because Working the Land owners are more knowledgeable about commercial harvesting. Most Working the Land owners were aware of when their woods were last cut (often by prior owners), and they had a good idea of when they would next be ready to harvest trees. Many were generally aware of timber markets, and said that timber prices would factor into their decision to harvest trees.

These are all natural things, they have a natural life. So there is a point at which a tree is at its peak health and vitality. You can harvest it. (WTL, PA)

So from a selfish economic perspective it would make sense to harvest a tree when it's at its most mature. ... And if it's done right with the right help you could plant back so that your forest grows back in a more healthy and sustainable manner and in a way that works for your goals. (WTL, PA)

Well, it's not just the money. It's just making use of the resource. So a forester looks at that and says 'here's a resource.' That's how we build furniture and we build houses and we build those nice oak bowls that you like. (WTL, PA)

Woodland Retreat owners' views on removing trees vary: some do mourn the death of every tree, but most are open to thinning and harvesting if it will help (or at least not hurt) the overall health of their woods and the amenities they provide.

But I guess in my mind I have a problem figuring out how we're going to grow trees just to cut them down and still keep it a forest. Pretty soon you end up like with a whole bunch of spindly little trees. No real forest anymore. (WRO, CO)

But overall, it is an absolutely beautiful forest. I mean it was like it was enchanted as far as I'm concerned. It has that kind of beauty to it. Cutting it would be awful. (WRO, NC)

And I suppose if I was starving for money I'd probably cut down some trees but I have no—we bought it because of those trees. We should have more. (WRO, CO)

You could go in there and do some harvesting. But then you'd end up with a road. You know, even a dirt road—it just would look ugly. (WRO, CO)



I didn't buy the land to make money. However, I do view the trees as a renewable resource. (WRO, PA)

You just about have to do that. If you're looking after your woodland you just about have to have someone harvest every once in a while. Because if you don't they rot in the woods. Because trees only live and are really worth anything for so many years. (WRO, NC)

But even those Woodland Retreat owners who are open to harvesting trees are very nervous about the harvest and tend to postpone any decision or action on this front. Because of their lack of knowledge and planning, they are more likely to have bad experiences with harvesting trees.

Part of my problem was we had it forested a while back. And the areas that they cut, in my opinion, cut it the wrong way. And it's left me with a bunch of acreage now that has nothing but weeds and briars and that's pretty much it. So it's gonna be up to me now to go out there and replant because it's not doing it itself. So down the road I'm worried about who we're gonna get to do that. (WRO, PA)

When they do come and thin them, do they leave a-- are they careful about when they come in? 'Cause I've heard bad experiences—(WRO, NC)

Some people go on logging paths, they tear it up. (WRO, NC)

I don't know what trees are good trees to sell or expensive or cheap or whatever. I don't anything about that. (WRO, NC)

Woodland Retreat owners will likely be open to harvesting trees when they have confidence in the advice that they're getting and in the vendor doing the job. Also, because the decision to harvest is a bigger step for Woodland Retreat owners than for Working the Land owners, they also need to be convinced of stronger benefits in terms of the health of their woods and/or income. A few explicitly said that knowing more about the financial and ecological benefits of harvesting, and confidence in the fairness of the process would help woodland owners make the decision to harvest their trees.

Well, one of the things I wrote down was looking at a possible harvest of the hemlock trees before they all die. One of my neighbors is selling trees right now of all species, including hemlock. So I'm going to wait and see what that operator looks like and what kind of a mess he's leaving and see if he's interested since he'll be on the neighboring property. (WRO, PA)

I don't plan to sell any timber from my land—but the last time the people come to my place, talk to me, say 'hey, you want to have some wood for sale.' And



when they give you price, you may quote \$500 and he made give me over \$1000. The price varies so much. And I've got to learn myself how to calculate the per-board -foot everything. ... So if we have that kind of help, information, there'd be more incentive for us to take better care of the woodlands. (WRO, PA)

If the value was such that it would allow me to use it to build the solar farm. To where I could actually benefit financially doubly and still have the land. So I'd still get the best of all worlds. I would wind up getting enough money to finance my solar dream and then hopefully that would pay...to keep the land forever. (WRO, NC)

I will talk to a forest ranger now that I have been schooled here. I'm not going to just call up some type of person that says he specializes in contacting loggers and just try and do it blindly. That's how people get their land messed up and get irresponsible people in there that just tear it up will-nilly. I won't do that. (WRO, NC)

Improving Wildlife Habitat

Woodland owners generally like wildlife and wish to support a variety of fauna on their land. Many landowners take actions to encourage wildlife, such as leaving brush piles and planting food plots.

And every time I cut down a living tree I'll pile up all the brush and put logs on the bottom and raise them up off the ground with rocks to make it a cavity. Because I read that that's a good thing to do and I know it works. Birds and lots of other things use those brush piles. (WRO, PA)

When we seeded the area we used a pasture mix rather than like a lawn mix for a good portion of the lawn so that it would provide a food source. (WTL, PA)

I think that, you know, some of it is just knowing what wildlife likes. So grapes, for example—you know, wild grapes are important to lots of different wildlife. So that is something that I don't cut. And in fact, I encourage them on my property because I know that that's important food for the ruffed grouse and other things. And aspen trees are important to ruffed grouse. And I know what trees deer like to eat and what they don't. So I make conscious decisions based on that? (WRO, PA)

A few landowners reported that they have taken systematic steps to encourage certain species in their woods or water bodies.

I planted a food plot for deer to entice them onto my property away from the hunters on the adjacent plot. Hasn't worked but it was an attempt. I think we



have the only wildlife refuge in Goldsboro. 'Cause my wife likes wild animals. I do, too. (WRO, NC)

After the fire the fish population was 100% destroyed. ... And so we had worked hard to develop just a class A wildlife, our fishery there. And we do have probably the finest fishery in western Colorado and some people say the United States. (WTL, CO)

For Woodland Retreat owners, protecting wildlife habitat and viewing wildlife are important reasons for owning woods. They like having animals and birds in their woods, and enjoy watching them, even though some are nervous about the presence of dangerous or less attractive animals (like skunks or bears). Most of them believe that there is enough wildlife in their woods, although some long-time owners noted that they see fewer of certain birds and animals now. Nevertheless, Woodland Retreat owners say they would like to know how to attract more of the birds and animals they like to see. They also value species diversity and are especially interested in protecting declining or endangered native species.

You know what, the habitat's so great out there we don't really need any improvement. (WRO, CO)

When I first moved on my farm we had a lot of pheasants. I don't ever see a pheasant now. I used to see deer in herds on my fields and I haven't seen a herd a deer on my farm for 20 years. (WRO, PA)

We get quite a bit of wildlife as it is. Owls, eagles. A lot of different species. I don't think I'd want to plant anything that is non-native just to attract other kinds of animals. Bad for the animals, bad for the environment. But maybe if we could do something to increase or decrease what we want or don't want, using trails and/or trees or shrubs that are native to our area then I'd probably be interested in that. (WRO, CO)

But if the Department of Agriculture, either at the federal level or the state level, had some type of initiative or ideas that I could be more responsible to help the wildlife I would be willing to listen. (WRO, NC)

What do coyotes not like? Because we didn't invite them. (WRO, PA)

Most of the time I don't want to attract them. [LAUGHS] I'll say, hey you can go out there in my forest and do anything you'd like to but don't come to the house. (WRO, NC)

Working the Land owners also like wildlife, but they see animals in their relation to other aspects of the forest. They realize that some wildlife damages trees, soil or water (e.g. beaver dams flood wood and farm land) and try and control these pests. Working the Land owners are



also aware of the impact of domestic animals in their woods (like overgrazing from cattle) and take steps to protect their woods from their own or their neighbors' animals. Like Woodland Retreat owners, most Working the Land owners believe that there is enough wildlife in their woods. Still, many regularly take small, inexpensive actions to maintain animal populations for viewing or hunting.

This for me, I kind of look at as overall stewardship of woodland. So I'm into planned grazing. I don't just run cows or somebody else's cows. I've got electric fences through all those dead fallen pinion trees. ... So I try to integrate that activity in with the rest of my forest management. (WTL, CO)

A few of the woodland owners in our groups had hunting and fishing leases. In addition to generating some income, some felt that this protects their woods from illegal hunting. They also believed that the hunting club was taking the necessary steps to maintain a healthy forest and habitat.

And the funny thing is I do lease most of the little property that I have to hunting clubs. And the purpose behind that is because they help conserve the land. They keep other people off the property. And in a lot of cases they are harvesting deer. And too many deer in a forest is a real problem. (WTL, NC)

The other nice thing about renting to the—this is responsible hunting club members. They put a gate back there with a lock and they don't tear up the land. They kind of clean it up. Whenever there's any fallen trees or something like that they've actually gone out with chain saws and cleaned it off the game trails. So it's a real responsible hunting club. (WRO, NC)

Controlling Invasives, Pests and Diseases

During these focus groups, landowners shared lively stories of their battles with particular pests or invasive plants and enthusiastically exchanged advice on how to control them. Almost all landowners seemed to be waging battle with invasive plants, and most felt that they have little chance of preventing or eliminating them. The best they can do is control these populations on their land.

Yeah, I think for us the invasives are a big deal. And I don't know that that affects the timber quality but it certainly makes it hard to enjoy your land when you've got those doggone—that barbary that comes in there—and just run rampant on our place. And I do some of the same [removal]—but I've given up on places so it's a spot activity. But that's a real challenge for us. Invasives. Over a 200-year deal that's probably not really an issue but for us at a given time it certainly is. (WTL, PA)



We're dealing with some nasty things that are very difficult to get rid of. So it's year after year after year you have to keep working at it. (WTL, PA)

My invasives I deal with every year. And probably four or five months through the summer I do different ones. And some of them I've come close to eradicating. Some of them I never will. (WTL, PA)

But with anything, it's costly. That's been the big thing. If you don't have a chain saw that can handle all of that you're gonna have to pay for somebody to come in and do it. And if you have acres and acres and acres of it it's very expensive. (WRO, CO)

Woodland owners also realize that their ability to protect their woods from pests and invasive plants depends, at least in part, on the actions of their neighbors.

There's some problems in our area with the nap weed. And that's a big noxious weed. And if all of your neighbors don't participate in taking care of it it's a losing battle. (WRO, CO)

A few years back we got our neighbors all together—because we don't own a huge parcel—but we got all our neighbors together to spray for gypsy moths. And that was, I think, very effective. ... It wasn't so bad when we got everybody together. (WRO, PA)

If you've got a place right west of you that's got thistles the it just blows in. And it doesn't matter how much you work at it. (WTL, PA)

Many landowners—mostly Woodland Retreat owners, but also some Working the Land owners—were opposed to spraying pesticides and herbicides in their woods. Some were concerned about the ill effects of these chemicals on wildlife, soil and water. Others were unsure of their efficacy. Cost was also a concern: aerial spraying was considered too expensive for many landowners and spot applications as too time consuming.

We have the Russian nap weed. It's one of our biggest problems. And so in the past it's been spraying. But then you spray and you have to be real careful 'cause we've got fish. So you've gotta look out for if it hits the water, you know, what's it gonna do? Is it gonna stay in the ground years and years and years and kill the trees? (WRO, CO)

When my neighbors asked me if I would pay to have my property sprayed for gypsy moths I told them absolutely not, I don't want your helicopter anywhere near my property. Because spraying only kills like at best 90% of the gypsy moths. And when they reproduce they reproduce 500 times their number. So you're right back where you are the next year. Unless nature takes its cycle. So



I've never sprayed. I've lost I think three oak trees because of gypsy moths. That's it. (WRO, PA)

Well, even the most environmentally friendly spray for gypsy moths kills all butterflies and moths. You know, it's not just killing gypsy moths. It kills every single butterfly larva, every single moth larva and that's it. So you're killing Monarch butterflies and Luna moths and you name it. So I wouldn't do that. (WRO, PA)

There was a few years that we tried to spray and it didn't really work that well. And if we have continued dry years I don't think we can win that battle. (WRO, CO)

I'll give you another example of an unintended consequence. Our riparian buffer basically goes right through the middle of our pastures. And we planted a bunch of trees in there. And we had a volunteer from the soil conservation service or one of the groups that said that they would help and they came out and sprayed around those trees. ... And the next year I had solid circles of thistles in each and every one of those. (WTL, PA)

Woodland owners are looking for more surgical, effective and ecologically safe solutions to their problems with pests and invasive plants. Some of them reported they had had some success with spraying at specific times, using pheromone based pesticides, actively removing affected trees, and timing certain management activities to disrupt life cycles of pests.

This an old trick—if you go somewhere where the multiflora roses are diseased, the leaves look red and withered and weird. If you just take a pruning shears and cut off pieces, take it to your property and lay it on your bushes they'll all get the disease and die. Works really well. (WRO, PA)

Well, I called the state forest and they told me how to deal with them. And you have to just spray them early in the spring. Spray the tips of the pine trees. And it worked good because they've got a big growth coming out of them this time. (WRO, CO)

The last thing that we looked at—because our neighbors were using it for vine weed—is purchasing some insects that have been particularly bred to eat one type of plant. (WRO, CO)

And so the best way to deal with [beetles], I'm told, is to use—you can purchase pheromones. And there are two types—well, there are several types of pheromones—but in my case in particular I use them for spruce and fir. (WTL, CO)



Managing for Fire (in Colorado)

Woodland owners take the threat of fire seriously. Fire was, by far, the main source of worry and concern mentioned in Colorado. It was mentioned as a concern even in Pennsylvania and North Carolina, where it is not a significant threat.

In the Colorado groups, we explored landowners' attitudes and behaviors related to the threat of fire. Beetle kill and drought have left large tracts of dead/dying trees in that area, greatly increasing the risk of fire, and leaving landowners struggling to reduce fuels and maintain defensible space. The task of fire mitigation seems overwhelming. Most landowners are not able to address this threat systematically. They focus on maintaining defensible space around their homes, roads for access, and fire breaks. Some landowners said they try to ensure that firefighters will have access to a water source. A few Working the Land owners talked about considering controlled burns and focusing on fuels reduction in hot spots.

We have tried to remove a lot of our dead material. Either beetle kill or for any reason. And we've done that by using the wood for firewood for ourselves and invited friends and neighbors also to come and cut wood off of our property. (WRO, CO)

I think the open spaces with the farmland would help. [And] If you have water available to where you can pump and spray. Because by the time the helicopters get there and the planes, you know, you lose a lot of trees. I've seen them with their big buckets going in. Having that water available helped shut it down. (WRO, CO)

I mean, obviously, with the fire concerns, I'm always working, you know, out from the house and cleaning up things so that I've got myself a reasonable fire defensible area. And then after that the properties basically have meadows and draws and things so that you could work an area. (WTL, CO)

I would say it's gone from maybe more serious to still of concern. Because if I can, I'll drag out as many dead trees as I can with my tractor. And, you know, if you're taking out the hottest burning stuff I think you're working in the right direction. (WTL, CO)

But it's more like just cutting dead trees here and there. And that was my strategy. That combined with planned little pockets where I was intentionally making little wildlife parks. (WTL, CO)

Two additional challenges were mentioned: how to dispose of deadwood and slash and how to re-seed cleared or damaged acreage. Because of the drought, any replanted trees require additional care and watering. For this reason, one couple said that they are replanting their



land with fruit trees. They felt that the promise of fruit justifies the expense of watering those trees.

In terms of when people are doing the cutting of the limbs and fire protection kinds of work, what do you do with the stuff that's left over? (WRO, CO)

Well, a lot of the reasons are once you remove the deadfall, if you don't get something down there the weeds come up. And they spread and they're bad. (WRO, CO)

Another thing we need to put up there is re-planting of seedlings on burned property. And seedling care after that. You can just dig a hole and put them in there and a lot of them will die if you don't care of them the first couple years. If you take care of them the first couple years they get established and you have a bigger success rate. (WTL, CO)

Because fires start elsewhere and travel fast, people are not convinced that their efforts at fuel reduction will actually protect their woods. Ultimately, they rely on spotters and firefighters to minimize the damage.

But I think the point is is that there's so many dense areas that you can't possibly go in and thin it out. So it's gonna happen. So then it's up to two things. One is the fire control people. You know, how fast they can get on it. And we have really good spotters. (WRO, CO)

So the only way you're gonna stop it is you've gotta have some sort of active watchdog for that. Because you're never going to get rid of the danger. The danger's always going to be there. ... How could you possibly do any fire mitigation that did anything? (WRO, CO)

It's more like in the back of my mind risk rather than something that guides my action. Probably should. (WTL, CO)

Landowners are aware that the risk of fire in their woods depends on their neighbors' actions. Some had responded to this by investing in perimeter protection, but several others acknowledged the value of collaborative action and some regulation on this issue. Rising insurance rates and tightening criteria for issuing policies were also mentioned as a challenge by some respondents.

My properties interface with other people's properties. And you might have yours perfect but I can't—I mean, unless you want to barricade yourself off—which isn't aesthetically the way that you neighbor. But you still can create thinning and fire mitigations. And usually if you're doing something I think your



neighbors tend to be responsive, saying, you know, he's doing it, maybe I could do a little bit here and there, too. (WTL, CO)

Well, I haven't given any thought to it but I just spent 43 thousand dollars on the fire line all the way around our property. 200 acres. But that's once in a—I'll never have to do that again. (WTL, CO)

Our plan is just to try to at least have access to around the perimeter of our forested area. So if we can get, you know, close to where a fire is started then we have a better chance of keeping it from spreading or coming from the outside forest into our property. (WRO, CO)

[If] your neighbors don't do the fire protection work that can threaten your house. And should the homeowners' association or the government—somebody—have the power to tell you that that's what you ought to do? (WRO, CO)

And we've also mentioned Nighthorse, which is a big water project that been built. And we're negotiating with various and assorted people to supply water to that system from Nighthorse. And it's going to obviously cost money. And nobody's complaining about that at all. The threat is big enough that people are willing to [chip in]. (WRO, CO)

Your land may be up to snuff but surrounding land isn't and [your insurance] can still cancel. (WRO, CO)

Legacy Planning

Almost all the landowners that we talked with had given some thought to what would happen to their land after their death. A few (all Woodland Retreat owners) said they would likely sell their land before they died. However, the vast majority of woodland owners thought they would own their land until they died and wanted to pass their land to their children.

I think part of my big concern is inheritance of the land. How to make sure if we're not millionaires that we can, you know, send it on to our sons. And they be able to keep it as farmland, as woodland. (WRO, PA)

I'm gonna tell you it belonged to my husband's grandfather I suppose. And it was handed down from generation to generation, my husband died and I got it. And that's why I want my children to have it. (WTL, NC)

You want it for a lifetime and then it goes to your children. (WRO, NC)



Most landowners said they would like their land to stay wooded and for their kids to enjoy the woods as they do. However, this is not always easily arranged because many woodland owners' children don't live in the area. Furthermore, those who realize that woodland needs upkeep and attention fear their children won't be able to provide that.

My kids are from New York to California. No one's going to stay around here I don't think. So probably it'll be sold and divided and the money will be divided between them or something like that. (WRO, CO)

And then affordability. Our property's in trust for our children. But I don't know that they're going to be able to afford to maintain the property. We were fortunate that we can spend money and take care of it. (WTL, CO)

To me the biggest concern is the death tax. The inheritance tax. I've had friends that have had to sell part of their farm to keep the farm running to pay for the death tax. So the legal stuff is I think the hardest thing. (WRO, CO)

Landowners differ in how thoughtfully they have addressed the issue of land transfer. Close to half of the landowners that we spoke with had set up the necessary legal mechanisms to ensure their land transferred as intended. Many had just willed their land to their children. Some had used trusts to minimize tax burden on their children or to prevent sale and parcelization of their wooded land. Because Working the Land owners consider land as a substantial financial asset (in some cases their *only* financial asset), they were more likely than Woodland Retreat owners to have taken these steps. Similarly, those who owned larger parcels that generated rental income were more likely to have planned for the future of the land.

Our property is in trust for our children. ... We just have such a remarkable place we just can't bear to have it sold. And just now once our children receive it in trust they can sell it. And it's my intent to, in our estate, to see that [our daughter] has enough cash to buy out the three grandchildren who two of them have never been to the property. They're in Georgia. And so we hope to establish a financial plan so if they wish to sell she can buy their interest from it. (WTL, CO)

Because once you put your property into Clean & Green—and we did that. And we did it for this very reason. You get a tax break because you have not developed the land. If someone then buys that property and chooses to develop it they then have to pay all those back taxes on that property. So it's a huge disincentive for somebody to come in there [and develop the land] unless they want to make up that tax difference. (WRO, PA)

I said to my daughter, I said 'you watch those trees.' Because if you live a life like we all expect to live that long, she will be just right for those to harvest when she is my age. And it'd be a nice income. Nice little retirement for her. (WRO, NC)



For some landowners, one or two of their children lived close by and used the woods more than the others. These parents have to make a choice between giving all children equal share in the land or entrusting it to the one they think will be the best steward. This is a difficult choice for parents. Some woodland owners had taken legal action to ensure that the land will stay intact and wooded. Others said they had passed along their values and wishes to their children and hoped that they would work out a way to keep the land intact.

Well, my wife and I have had an argument about that. And you know, she wanted to set up some sort of a trust so that the land would stay, you know, that way. My daughter lives on our 35 acres with her husband and we have a house there. And you know, my wife would like that house not to be sold or go to anyone else. And my thought would be—you know, we have three kids. They all like the land. (WRO, PA)

We have five children. So that's kind of—with a hundred acres it's going to be a little challenging what we do. Hopefully all of them appreciate it and I assume that at least one of them will continue on that farm and we'd like to keep it in the family if we can. So hopefully just by passing on that appreciation for land and stewardship is our goal. (WTL, PA)

Well, we have a different attitude about that than a lot of people do as far as inheritance. And our feeling is those that show interest and have helped take care of the place should get it. And those that don't, shouldn't or won't. (WRO, CO)

I don't like the provision in a will to split it among children because the child that might be the best steward might not be able to buy out the others. We've talked about it but I'm currently of the mind to sit and watch a little while to see who's going to be [the best steward]. (WRO, PA)

Some woodland owners said they were considering legal options to ensure their land stays wooded, while others said they had simply conveyed their wishes to their children.

So how do I preserve this? I'm a member of the Center County Farmland Trust which is trying to set property aside. And there are other ways to protect property. I haven't decided yet what's the best. I'm still in the process of trying to find out what my options are and how to optimize them. (WTL, PA)

I want to visualize someone or a method by which it will stay as close as it is right now to reality without being completely divided up or destroyed or changed because it's so beautiful the way it is now. (WRO, NC)



Our will's made out for the kids to split. So if one has to buy out the other, like he said, they're not all economically equal. So they're not sure how they like it but what are you gonna do? ... Their dad already told them it has to be to each other. I mean if possible. 'Cause it's already a family heirloom so he doesn't want it passed out. But there's two of our kids that could afford it so that makes it look a little happier. They could buy off the other ones and do what they want. (WRO, PA)

In all groups, landowners expressed a reluctance to constrain their children's use of the land or to be seen as "controlling from the grave." Woodland owners also feared that taxes might make it difficult for their children to keep the land. In that case, they would rather their children sold the land for the best price than lost it to the State.

As your forester looks at it he's gonna give you advice on what to do. I mean, I look to a professional to help make those calls. And if my kids are in charge of the trust down the road I guess I have to let them and their technical adviser tell them what to do. And they have to make the decision. I have to trust them to that. Hopefully, I've gotten them to appreciate it. (WTL, PA)

Because after we're going they're going to do what they want to. Unless you tie it up somehow. And I don't believe in that. I believe them being smart enough to make the right decisions and do what's right. ... Well, I've got a book that's got each farm and it's got listed if they have to sell it what the road frontage is worth, what the back part's worth, if they sell it as an entire unit what it's worth and stuff. (WTL, NC)

But I don't know if you can really hold someone's feet to the fire. Because if they can't pay to maintain the property and that sort of thing—unless you leave them the money—the tax man come and he'll come and take your property away from you. ... So you can't really tell someone they can never sell it. (WRO, PA)

Well, after I'm dead I'm not gonna care. Our kids, they know. They've grown up there. (WRO, CO)

Who are we to say you should timber this or you should... we're just temporary. That land's been there for thousands of years. Why is it our right as this generation to cash in on that or to not cash in on it or say what you can or can't do? It's kind of an ethical-moral issue to some degree. (WTL, PA)

Legacy planning takes on a special significance for woodland owners who don't have children of their own. We spoke with a few landowners who were in this situation. One of them had put her land in an easement; another had willed it to a nephew who, he believed, would be a good steward; and a third person had not made any definite plans. Others planned to sell their woods.



So we're kinda stuck with looking at, okay, who out in the big world there is going to be the steward, offer the stewardship we feel that is important. (WTL, PA)

Well, for us it's nieces and nephews. We never did kids. And so it's like who could afford it. And who would want to move from where they live down near Philadelphia, you know, at a point in time that they could afford to move up here, relocate, find jobs that would support it or whatever. (WTL, PA)

No, not really because I'm single. I've got a nephew but that's about it. I've got—in regards to future plans on if and when I go to my heavenly reward, I hadn't thought about what would happen. I was going to will it on to another family member but I haven't thought about putting any type of stipulations or written any land management—woods management plan in with that. (WRO, NC)

Well, I'd like to protect it for what it is forever. But we have too many people on this planet—people are gonna do what they're gonna do and I can't control everybody. And if somebody buys it and says they want to cut down half the trees I wouldn't put stipulations in the selling agreement but I would like to find somebody that would keep it as is. (WRO, PA)

A couple of landowners took comfort in the fact that their land was not suited for other uses and would likely be purchased by someone who appreciates the woods and intends to keep the land wooded.

In my situation I think that the topography will preserve the forest. And the fact the one residence is all that's permitted. (WTL, PA)

Well, probably to sell it but the conservation easement is perpetual. So it belongs to the La Playa Open Space Conservancy. So they would be the ones who would actually have to come out and police the next owner. But also, everybody in the ranch—most of them are under easement so you would get other ranch owners policing the other people. And we have some covenants, too. So I'm not worried about it actually. (WRO, CO)

We'll sell it because it's not our home. Our family's not here. I don't think my kids will want to stay here. And the land is mostly on a flood plain, which can't be built up—theoretically. So I'm not really concerned that it's going to be developed. (WRO, NC)

Conservation Easements



A handful of landowners already had easements on their properties or lived in covenanted developments that curtail building and obligate landowners to perform certain management actions. These landowners saw easements and covenants as a failsafe way to ensure that their woodland would not be subdivided or developed in the future. This was especially important to landowners who wanted to maintain intact wildlife habitat.

So one thing that I did was do a conservation easement on my land. Which basically means that it's forever in that easement and 90%, you know, of the acreage cannot be developed. So what this does is it preserves the habitat for the wildlife. ... So I have 80 [acres]. And 72 are in a conservation easement. So there's 72 acres for the elk to run around. (WRO, CO)

Most of the other landowners had little or no knowledge of easements. When the concept was explained, about half of landowners expressed interest in learning more.

This is something I would talk to [my children] about. ... And I would go with whatever they wanted. (WRO, NC)

Yeah, I would like more details because I would like to preserve a lot of the work that I've put into it. The person behind me, though, it's probably not going to be family. I'd like to make sure the trees are still there and they're not changing it drastically from the way it is now. (WRO, NC)

I'm struggling with the conservation easement because of the restrictions that it applies to the farm and what that does to the marketing of the real estate. So I'm exploring options to that. But we are certainly considering that, too. (WTL, PA)

As mentioned above, about half the landowners said outright that this mechanism was not for them. The main reason for this was their reluctance to give up control of their land or to constrain their children's use of the land.

You still relinquish control. And there's still no guarantee that the person who comes after you will make the same management decisions as you. (WTL, PA)

You can get yourself into a real bind. And the government wins and you lose no matter what happens. I don't particularly like the government getting involved. ... And what I would like to do is keep control of my own property. And I don't want the government on my land unless there's something that I'm not thinking of that I would need to have them. But no, I don't think I'd ever do that. I've thought about it. But if I lose control, no, I will never do that. (WRO, PA)



We've put [our land] in a family trust. And I think [our children] would like to have the control, decide what they would like to do with it. So we really haven't thought about conservancy. (WRO, PA)

Well, if I had created it or built it into what it is. But basically I bought it and I've maintained it. And so it's serving my purpose, plus it gives me a lot of enjoyment, personal pride just to be able to go out there... I figure my children would have an opportunity to do whatever they want with it. (WTL, CO)

Financial concerns are important in this decision. In the vast majority of cases, easements limit land use, market value and the buyer pool for the land. Some landowners noted that easements and covenants can actually increase land value in some areas, but this is not common. Many participants were averse to encumbering their children or surviving spouse in this way, and even to tie their own hands should they need money in their later years.

It's complicated. First, it's an unknown. Your land gets devalued and then you get your tax credits. But you don't know what that's going to be until after you get the whole appraisal. (WRO, CO)

Can you afford to walk away from your equity for the peace of mind you might have knowing no one was going to cut down those trees you just planted. (WTL, PA)

Well, I'd say I'm willing to forgo some cash value because I don't need X number of dollars. I'm good here. But then if you live to be 104 then... (WTL, PA)

A lot of our wealth is tied up in our ranch. And so we kind of need to have the flexibility that if later in life if we need to liquidate some of it for ourselves that we can do that. (WRO, CO)

Landowners' openness to easements seems to depend on how suited the land is for alternative uses. If development pressure on the land is low, having an easement does not put debilitating constraints on the use and value of the land, and can make it easier for a landowner (or his/her heirs) to maintain the land.

I have an easement on my farm so that it can never be developed. But when that happens it drops the value of the land. And my farm is in an area that's potential for development because of how close it is to [a main road]. And the farm was appraised—I have 20 acres of flood plain and 20 acres of swampland. And I couldn't believe that they appraised my property for how [high] they appraised it for. Because of the flood plain and the swampland. (WRO, PA)

I tried to play the game. There's some tax incentives—well, depending on where you are. The federal taxes for me because I didn't make that much money



weren't that attractive to me. But the state tax incentives, especially before they started reducing the thing down, were pretty good. And so, you know, I'm not trying to be cocky but I facetiously said 'my plan is to buy land once and sell it twice.' And so that drove some of the thing. For me, I wasn't trying to do estate planning; I was trying to get myself out of debt. (WTL, CO)

Another factor in the decision is the degree to which a landowner's current and anticipated uses for the land match the terms of the easement. An easement arrangement is much more attractive to landowners if it permits landowners to continue using and managing the land as they currently do. One of the landowners who had an easement said she had backed out of a contract that constrained her use of the land before finding an organization that offered easement terms matching her goals for the land.

I opted against Clearwater. Because they divided my land into three segments. And if a tree fell in segment one and two I couldn't cut it up and use it. ... So they had so many restrictions that I went to the Pennsylvania Land Preservation Board. And that's where I have my easement. ...The Pennsylvania Land Grant did nothing. It was like they grandfather-claused in everything as I use it. And I like that. (WRO, PA)

