

Summary of the Committee for Family Forestlands Survey Sent to participants in the 2001 Family Forestlands Symposium at OSU

Introduction:

In the fall of 2004, the Committee for Family Forestlands (CFF) sent a brief survey to the 186 family forestland owners who had attended the 2001 Oregon Family Forestlands Symposium at OSU. That symposium was initiated and facilitated by the CFF, which had been chartered as a standing, statutory advisory committee to the Board of forestry, just the year before. A cover letter was included in the survey mailing. It summarized CFF activities of the previous year. Over the course of the fall of 2004, the CFF received 66 responses to the survey.

The goal of this project was two fold: First, to reconnect those of us who serve on the Committee for Family Forestlands with the landowners who attended the 2001 symposium. That meeting and the four regional roundtable meetings that led up to it were important events that have helped shape CFF activities in the years since. The second purpose of the goal was to “reassess the broad range of forest policy issues that you, as a family forestland owner, feel are important” (to quote from the cover letter). It is our expectation that the responses to the survey will help define the priorities of the CFF, as we move ahead into 2005.

The survey had seven questions. Two of the questions were multi-part and asked the respondents to rate their concerns on a scale of importance (1-5). The other five questions were quite broad and open-ended. As a result, we received a very wide range of responses. Attached to this summary is a document that lists the questions and the responses to each of them. The answers we received to each question are grouped into general “themes”, which are listed alphabetically under the question. The bulleted answers to the questions are in the words of the respondents.

Comparison to OFRI Survey:

At about the same time the CFF was conducting this survey, another survey of family forestland owners was undertaken by the Oregon Department of Forestry (ODF) and the Oregon Forest Resources Institute (OFRI). It is interesting to compare the two surveys and their findings. The value of the two surveys, when viewed as a whole, may be “greater than the sum of their parts”.

The CFF survey was conducted by mail, with a pretty “self-selected” audience. Landowners who attended the 2001 symposium were undoubtedly some of the most active and motivated of family forest managers in the state. Those who responded to our survey are the most motivated of that group...”the top 5% of the top 5%”, so to speak. They also represent the medium to larger ownerships in the family forestland class. The questions asked were mostly open-ended and primarily policy-oriented, designed to solicit answers that will help the CFF more effectively represent family forestland owners before the Board of Forestry.

The OFRI survey was conducted by telephone interview and solicited responses from 400 landowners, state-wide. Names were randomly selected, from lists provided by the Department of Revenue. Ownership sizes ranged from 1-5,000 acres. There were a total of 35 questions, all of them requiring either a multiple choice answer or an “importance” rating on a scale of 1-5. The primary purpose of the OFRI survey was to help the Department of Forestry better identify the needs (information, technology, monetary assistance, etc.) of family forestland owners around the state and what programs can meet those needs. Similar surveys have been conducted with industrial forestland owners and “urban forest” managers. The combination of these surveys will help senior staff at the department and the Board of Forestry set work priorities and shape future budgets. A summary of the findings from OFRI’s “Family Forestland Survey” is also attached.

CFF Survey Highlights:

It is important to bear in mind, as you read through the attached CFF survey document, that not all of the 66 respondents answered all of the questions. Also, some of the questions had multi-parts and not everyone responded to all the parts. Some answered only one piece of the question. Finally, some people gave us considerably more than we asked for in an individual question, so their same response will show up more than once in the document!

1. Management/ownership change: The first question had to do with any significant changes in ownership size and management decision-making since 2001. Only one of the respondents said that his or her ownership has decreased in size. The majority indicated their ownership is the same or about the same size as it was four years ago. However, a fairly substantial percentage has increased ownership size, so as a group there appears to have been a net gain in family forest ownership here. These owners have also been pretty active in intergenerational planning, by getting their “kids” (adult offspring) more involved in management and doing quite a lot of estate planning. A number of respondents mentioned forming family LLCs, or were at least thinking about that option.
2. Concerns identified at the 2001 symposium – How they stack up today: During the 2001 Oregon Family Forestlands Symposium seven key challenges or “stresses” were identified as the greatest concerns at the time for owners of family forests:
 - **Need for equity** in sharing costs of regulation
 - **Complexity** in regulations, science, policy, global market forces, etc.
 - **Uncertainty** in the future
 - **Challenge of land transfer** from current owners to next generation
 - **Lack of trust** between small owners, government, industry and public
 - **Lack of public recognition** of the distinct nature of family forestlands
 - **Inability to communicate** the rural stewardship story to an urban public

When asked to rate those same challenges and stresses today, on a scale of 1-5 (#5 being the greatest), respondents to the survey scored all seven issues at an average of 3.2 or higher. The overall average was 4.2. Clearly, the key challenges of 2001 are still with family forestland owners today.

3. Changes in ownership challenges: Question #4 asked about ownership and management “challenges” that have grown in importance since 2001, beyond those identified during the symposium. A quarter of the respondents simply said there have been none. But the largest “grouped theme” response to the question had to do with timber harvesting and marketing issues (13%). This is a very significant change from 2001, because harvesting and marketing didn’t even make the list of key “challenges” and “stresses” identified at the symposium. Fewer mills, increasing distances to mills, more specialized mills that don’t process large or small logs anymore...these are all identified as growing concerns. The challenge of protecting private property rights and dealing with regulations is also frequently mentioned here (9%).
4. Priorities for CFF- Regulations, Outreach, Markets: Answers received from question #5 may be the most significant for the Committee for Family Forestlands. It asked what the respondent thought the priorities of the CFF should be in 2005. Mentioned overwhelmingly (48%) is influencing the development of regulations and working to limit their impact on family forests. There is much concern voiced over the growth in forest practices rules, the complexity of rules, the need for greater rule flexibility and the need to move away from regulation and toward incentives*. The second most mentioned priority (21%) is for the CFF to help increase the public profile of Oregon family forestlands, by raising the awareness of the public, ODF and the Board of Forestry with regards to the growing challenges faced by landowners and also helping to foster a better understanding of the importance of family forestlands on the landscape. Third on the list and close behind the theme of “increasing awareness” is a call to help improve log and wood product markets (18%). It is not clear what the role of the CFF might be here, beyond informing the Board of Forestry about the importance of the issue, but the fact that it is the third most mentioned priority adds weight to its place in highlight #2, above. Other priority “themes” suggested included landowner/public education, taxes, fire and intergenerational land transfer. None of these are mentioned by more than 10% of the respondents.
5. Serving on the CFF & another symposium: One of the questions asked was if the respondent would be interested in serving on the CFF, or participating in another family forestland symposium in the future. 43 of the 66 respondents said they would be interested in attending another symposium and 14 said no. We counted 23 who may be interested in serving on the committee, but most of those simply wrote “yes” to the two part question and may have meant yes to only half of it!

6. Greatest concern for family forestlands: The final survey question asked for the respondent's "single greatest concern for the future of Oregon's family forestlands..." The greatest concern of the respondents (33%) is that family forestlands will simply disappear as an ownership class. Due to a multitude of pressures on them these properties may be bought up by industrial owners or developed for rural residential housing. The second greatest concern (27%) is over increasing regulations, both state and federal. Third, again, is the lack of viable markets (26%). Concerns over markets pop up in more places on this survey than any other issue. Tied at fourth are the themes of intergeneration land transfer/age of current owners and a general lack of public awareness of these lands and their owners (11%). On the land transfer and age issue, one person voiced his greatest concern both simply and eloquently: "My age – I'm 83 years old."

Recommendations for the CFF:

1. Continue to provide quality and timely input to the Board of Forestry, first on the survey itself and then on the issues raised in it, over time.
2. Send summaries of the CFF and OFRI surveys to participants in the 2001 symposium and encourage them to contact us with responses.
3. Watch (and assist where we can) the implementation of Ballot Measure 37 on private forestlands. There is potential for BM 37 to either accelerate the disappearance of family forestlands via land-use change, or to improve the viability of those lands by creating public/private equity in the cost of regulations. The Board of Forestry and ODF are beginning to take on this challenge already. The CFF should offer its assistance. Regulatory complexity and overload continue to be dominant concerns (based on the 2001 symposium and the recent CFF and OFRI survey results) of family forestland owners. Addressing those concerns should be a high priority of the CFF.
4. Sponsor a second Oregon Family Forestlands Symposium in 2006. It will have been five years since the first one and the landscape has significantly changed in a number of ways that will influence family forestland management. Use the CFF and OFRI surveys to help shape the focus of the next symposium.
5. List issues and questions raised by the surveys that we would like to bore deeper into and decide if the best way to do that is through a follow-up survey, at the next symposium, or both.

6. Growing concerns over log and other forest products markets is the single biggest change from the 2001 symposium to the 2004 CFF survey. This is a key viability issue for many family forestland owners. The committee should explore this issue more deeply to better understand it. And the CFF should encourage the development of partnerships (between public and private entities, tree growers and manufacturers, etc.) to maintain or improve markets sought by family forestland owners.
7. Continue to press the Board of Forestry, the Department, the Governor and Legislature on the need to provide incentives and technical assistance (riparian specialists, for example) to landowners, to lessen the burden of protecting public resources on their lands.
8. In its role as policy maker and regulator, the Board of Forestry is of critical importance to family forestland owners. The CFF should encourage the Governor and Legislature to make sure that the makeup of the Board always includes someone with a family forestland perspective.

Recommendations for the Board of Forestry:

1. Communications and Understanding: Schedule a Board meeting and tour focused on Oregon family forestlands, to increase communication between Board members and landowners and to foster a better understanding on the Board of the unique challenges of family forest management. Ideally, this should be done in conjunction with the next Oregon Family Forestland Symposium.
2. Regulations: The Board should do what it can to carefully and wisely implement Measure 37 in such a way as to preserve the integrity of the Oregon Forest Practices Act, while at the same time reducing the impact of regulation on landowners and moving resource protection down an incentives-based path. The Board should continue to press the legislature for the resources necessary to hire “regulatory specialists” needed by family forestland owners to understand and implement complex FPA rules. The Board should search for ways to better encourage landowner use of site-specific “alternate plans” to better meet the spirit and intent of forest practices rules.

3. Markets and Intergenerational Land Transfer: These two issues are certainly related. Healthy, viable markets for products grown on family forestlands will make land ownership and management more appealing to the next generation. Loss of markets in recent years is a big concern for family forestland owners throughout the state and a critical one in much of eastern Oregon. Although the Board has little direct affect on either of the two issues, it can and should encourage the Department of Forestry to work with OSU Extension to provide landowner educational outreach, as changes occur in markets and inheritance tax law. Perhaps the best thing the Board can do to encourage inter-generational family forest ownership is to establish and maintain a stable regulatory environment so that present and future landowners will be assured of a land base they can depend on to manage for their own objectives.

*It should be noted that the need for effective incentives to assist landowners was clearly recognized by the Forest Practices Advisory Committee (FPAC), when it delivered its recommendations to the Board of Forestry in September, 2000. The CFF has also focused considerable attention on the issue of forest practices incentives since 2000. Unfortunately, this growing call for the use of publicly-funded incentives has played against a backdrop of a depressed state economy and budget shortfalls.