

# Focus Group Discussions with Massachusetts Woodland Owners

April, 2017

## Introduction

Two focus group discussions were conducted with area woodland owners in Greenfield, MA on March 23, 2017. The purpose of these discussions was to get feedback on the state's current management plan format and to test some ideas for how this format can be improved to make management plans more useful, engaging and actionable for landowners.

These discussions were organized by the Massachusetts Woodland Institute and the Massachusetts Service Forestry Program. Landowners were recruited by the staff of these organizations and were screened to ensure that all of them had received a management plan in the last five years.

The discussions were held in a conference room at a centrally located hotel. A total of 19 landowners representing 17 ownerships participated in the discussions. Participants were a good mix of ages and represented ownerships ranging from eleven acres to more than 400 acres. Generally speaking, participants in the earlier group (3pm to 5pm) were more actively engaged in managing their land than those in the later groups (6pm to 8pm). About a third of the participants generated some income from their land, including timber harvesting, recreation (e.g. cross country skiing, civil war enactments) or farming leases.

Each meeting lasted about two hours and was facilitated by a professional facilitator. The discussion guide is attached with this report, as are the sample materials that were shown to landowners.

## Main Findings

### Why Landowners Get a Management Plan

- Landowners' motivation for getting a management plan appears to be a mix of financial and stewardship motives. Most landowners said they got a plan because they wanted to improve their woods and take advantage of tax breaks and other government programs. The relative importance of these two motives varied somewhat for different landowners, but most of the participants wanted to maximize the financial and ecological value of their land.

- Participants mentioned the following benefits of getting a plan:
  - Those landowners who were either actively managing their land or intended to do so appreciated that the plan clarified their vision for the land and charted a path to get there. The plan gave them direction and a sense of control.
  - For others, getting the plan was just a formality—a box checked off. They see the plan as the key that opens the door to government grants, tax breaks and cost-share programs.
  - Some landowners mentioned that it was important for them to leave something of beauty and value for their children. A management plan was seen as providing a guide to improving the woods and finding a way to pay for the improvements. A couple of landowners said that the plan had also served as a way to get their children and other family members more interested in the land.
  - In some cases, the process was initiated by a timber harvest or a chance conversation with a forester. For some, the plan had the additional benefit of clarifying their property boundaries. Others said it helped them understand the value of their timber, thereby protecting them from unscrupulous loggers.
  - Regardless of their motivation, all participants said they had read their plan and found it to be informative and useful. For some, the process had been the first time they had thought about their woods in a purposeful, strategic way.

## The Plan Development Process

- All landowners said the process of developing the management plan had been fairly simple. The hardest part seemed to be choosing a good forester. A few landowners said they weren't confident in their ability to evaluate foresters, while others said they simply hired one that came highly recommended or who seemed to be a good fit with them.
- Landowners' engagement in the plan development process varied. A few said they'd just had an initial conversation with their forester, after which he/she visited their property and came up with the plan. Others said they'd had several calls with the forester and even walked the woods with him/her. The most informed and active landowners said that they had discussed or co-written all parts of their management plan with their forester, and had an ongoing relationship with him/her.
- Regardless of the level of communication and engagement, most landowners were pleased with their interaction with their forester and felt comfortable about calling him/her with additional questions. However, many said they would like their forester to send them relevant material such as information on funding sources or timber prices.
- A few participants said that getting a plan is too expensive, but most others felt that returns from timber harvests, tax breaks or grants covered their costs.

- A couple of landowners mentioned that it can be challenging to develop a plan that supports multiple uses (such as recreational facilities, agriculture and timber) and meets the requirements of different government programs.

## Reactions to Plan Content

- As mentioned above, all landowners said they had read their plan. However, their familiarity with the document varied widely. A few participants had re-read their plan specifically in preparation for the focus group meeting.
- Early in the discussion, participants were asked to say what parts of the plan they found particularly interesting and useful. This open-ended question was intended to see what is most salient for landowners. While most landowners said that they found the entire document interesting and useful, a few mentioned the following sections:
  - Stand descriptions (because this was new information to them)
  - Maps, boundaries and aerial photos
  - One landowner said he especially appreciated the section on stewardship issues, even though it read like “boilerplate”. This led to a discussion among the participants, after which they concluded that boilerplate informational materials can be valuable but should not be included in the plan document.

## Property Overview

- Most landowners liked this section, although its perceived value depended on landowners’ own knowledge of the property. Those who were new to the property especially appreciated the forester’s ability to piece together the history of land use on their property and relate it to current conditions and future possibilities. One landowner expressed this as “a story of the land, that is still being written”, and noted that the management plan documents this story.
- Although some local and regional context can be valuable, landowners wanted this section to be specifically about their property and its history.

## Landowner Goals Table

- Most landowners felt the goals table was a handy tool to guide their discussion with their forester. However, many also said that they crystallized and articulated their vision for their land through discussions with their forester. This vision is rarely reflected in the goals chart, although it is sometimes expressed in their goal statement (where the landowner is asked to express their goals for the land in their own words).
- Many landowners start out with broad goals for their land, like “maximizing the value of their woods” or “keeping the land healthy for future generations.” They may need their forester to help translate these general goals into more specific ones that are listed in the table.

- Some landowners said they had checked almost all the goals because they agreed with them all. Others said they simply followed their forester’s guidance and marked the goals that government agencies want to see as “very important”.
  - Some said they had difficulty rating these goals until they understood the possibilities offered by their woods. For example, the goal of generating income from timber harvests may not be viable if a property has no commercially valuable stands.
  - A few landowners also said they didn’t understand the implications of different goals for their woods. They were therefore unable to assess how well the management actions suggested in their plan reflected their goals.
- Several landowners said that they would alter their goals somewhat now that they were more engaged with their land and had a better understanding of the possibilities. They felt that there should be a relatively simple (and inexpensive) mechanism to amend and adapt management plans.
  - A couple of landowners said they had different goals for different parts of their land and the plan should have some room to reflect that.

## Stand Descriptions

- Organizing their land and, therefore, the management plan by stands made sense to everyone. The concept of stands being based on vegetation, soil and topographical features was new to landowners, but they understood the logic and appreciated the expertise that went into defining stands.
- Some of the more experienced landowners were aware that different foresters might identify stands differently. A couple of them said they had their own ways of referring to different parts of their land and wanted their foresters to conform with those as far as possible.
- Most landowners really appreciated the stand descriptions. For most this was new information and represented expertise that they did not have and information they couldn’t get elsewhere.
- Landowners were shown a Stand Summary Table that was developed for the Bird Plan. All of them said that having that table at the end of the stand descriptions would be helpful. A few respondents said that all acronyms used in the table should be explained right there so they don’t have to turn pages to refer to them.
- These landowners also endorsed including a Stand Map in the plan. Two version of a stand map were tested—an aerial photo of the property with stands outlined and labeled, and a line drawing with the same information. Landowners liked both. They felt that the aerial photo was nice for its novelty and because it helped them locate features, but the line

drawing was clearer and easier to understand. If only one illustration is to be included, they suggested that it be the line drawing.

- If maps are included, font and color are important. Some landowners requested larger, better quality maps that are easy to read and have room for additional information about stands.

## Management Recommendations

- In general, landowners agreed with the management actions listed in their plans. Many said they had discussed these actions with their forester before they were included in the plan. In two cases there had been disagreements between what the forester recommended and what the landowner was able/willing to do, which had been resolved by writing the recommendations in a more ambiguous way. (Both these disagreements concerned the use of herbicides for controlling invasive plants.)
- As currently presented, management recommendations work well for landowners who are already managing their land actively, often in collaboration with a forester. However, they fall short of addressing the needs of landowners who are not as well informed and don't have easy access to professional advice. Most of these landowners said they intended to follow through on plan recommendations, but they also voiced several concerns, such as:
  - To some, the timing of recommended management actions seemed too aggressive and, therefore, overwhelming. One person suggested resolving this by including guidance on the urgency and complexity of each recommended action. Another suggested including a range of times or a more flexible timeline for each action, while noting if that action should be sequenced in a particular way with regard to other activities.
  - They felt that some actions may have unintended consequences that undermine other goals. For example, one person was hesitant to thin the woods as recommended for fear of invasive species taking root. Another felt that managing his woods for birds could create problems for other species. A third asked how the actions recommended in his management plan would affect his animal husbandry operation.
  - A few participants mentioned that actions suggested in their plans may not be very practical or cost-effective, for example thinning a stand that is hard to access.
- With regard to management actions, landowners want practical direction rather than silvicultural expertise. A lot of this practical guidance concerns the most efficient and cost-effective way to get the most urgent things done. Landowners don't simply want to know *what to do*, but also *how they should do it*, and that "how" needs to be tailored to their resources and abilities. For example:

- They want to know what they can do themselves and what will require hiring loggers or other operators. If they can do it themselves, they need guidance on how to do the operation or where to get needed information.
- They also want to know what the operation will cost them and how that money can be recuperated, e.g. through timber sale or government grants. Most landowners are willing to take actions that are financially neutral for them, but they need assistance in accessing the right grants and programs. Landowners are willing to time their management actions so they can be done most cost-effectively (e.g. a logger may have equipment in their area or a program could be offering funding for a particular action).
- Participants in these focus groups said they would appreciate periodic communications from their forester (or state agency) alerting them to information (such as program application deadlines or timber values) that is relevant for accomplishing the actions in their management plan. Most of them preferred to receive this information via email.

#### *Management action summary table*

- Landowners reacted positively to the summary table of management actions. The most attractive feature of this table was the column that specifies available cost-sharing, grant or income opportunities and clarifies the net income/outflow from a particular action. To make this table even more useful participants suggested adding a column on the complexity and duration of a recommended action and also note if there are any relevant program application deadlines or prerequisites (like permits).

#### *Charts showing timber volume and value*

- Participants were also shown two charts—a pie chart showing the distribution of different commercially valuable wood species on their land (by volume) and a bar graph showing the value of these species. These charts appeared to be more useful for landowners who aren't managing for timber and know relatively little about timber values.
  - The more experienced landowners noted that the timber prices vary a lot over time and are affected by many factors (such as access and ease of extraction). They did not set much store by generalized estimates of timber value. Landowners who don't manage for timber and, consequently, know little about timber markets liked the pie chart as an additional data point to help establish the value of their land, especially when it was sold or passed to the next generation.
  - The pie chart was also more interesting for less informed landowners. The more experienced participants said that they already have a better and more nuanced understanding of their timber resources. They were also skeptical of the foresters' ability to assess timber resources without a detailed survey.
  - A couple of landowners said that, to be useful for them, these charts should also reflect value of cordwood and low-value pulpwood.

### *Illustrations of different management actions*

- We also requested landowner feedback on sample photographs and line drawings designed to help them visualize how their woods might look after certain management actions. Participants were confused as to the purpose of these pictures. They felt that if the purpose was to educate landowners about management actions and their effects, they should be included in supplementary informational materials and not in the main management plan. Alternatively, if the purpose was to show landowners what to expect in their woods, these pictures were seen as too generic, because the overall effect of any action depends on many property-specific factors as well as the quality of the logging operation.
- Landowners also felt that these photographs and line drawings were not very informative. The consensus was that if a forester or logger recommends a management operation, he or she should take landowners to other similar sites to see its impact.

### *Worksheet to track management activities*

- In general, landowners reacted positively to the worksheet, but not with much enthusiasm. Several landowners felt uncertain about the kinds of activities that should be recorded. Some landowners felt it would be useful provided some of the information was pre-filled by the forester. They felt it would be even more useful if it could be an electronic document shared with their forester and could be used to cue and direct informational updates
- A few participants felt that it felt like another “to do” list (not their favorite thing) and that they were not likely to use it.

## Other Ideas for Improving the Plan

- The management plan should be as long as it needs to be, but no longer. In particular, landowners suggested deleting all boilerplate material, and only including information specific to that property. Specifically, they said that the plan should focus on the landowner’s long-term objectives and the key actions to get there.
- A few landowners noted that there is some redundancy and repetition across different sections. That should be edited down.
- Landowners suggested that the management plan should be designed like a document to be referenced frequently. This calls for better and clearer organization, a good table of contents, and good section introductions and summaries. The tables summarizing the stands and management actions were both appreciated because they offer an easy way to find important information.
- Landowners were fine with the overall look and feel of the plan. While more graphs and pictures would be nice, most want these to be instructive rather than decorative. Overall, clarity of images is more important than making them realistic or attractive.

- Most landowners need more practical guidance on how to implement management recommendations. They requested adding a “Resources” page to the plan format, which would describe relevant resources. They were fine with having a standardized list of online resources provided it is organized by topic, and/or annotated, so they can go to the most relevant websites for the specific information they need.

## Concluding Thoughts

For many in forestry, a management plan is the gateway to active land management. It is regarded as the first, basic action that a landowner must take to become a good steward of their woods. The discussion with these landowners suggests that a management plan does indeed open the door to stewardship activities on the ground. It is then up to natural resource professionals to take advantage of that opening and guide landowners towards actions that fit their goals and resources.

While these discussions yielded useful information regarding user-friendly plan formats, they also revealed that the quality of landowners’ interactions with forestry professionals before, during and after developing the plan are even more important. It is through these interactions that landowners can understand the possibilities, clarify their goals, identify and obtain needed resources, and gradually build the confidence to take recommended actions. Furthermore, these interactions can help foresters understand landowners’ skill level, priorities and resources so that the plan can be written in language and at the level of detail that fits the landowner’s’ needs.

Finally, the importance of ongoing communication and “nudges and cues” from the forester cannot be overstated. Landowners, like most people, need these to translate their good intentions into action on the ground. Landowners requested both “push” and “pull” communications. “Push” communications include timely email alerts that cue specific actions. Participants also requested guidance on websites and other sources of information from which they could “pull” relevant information as needed.