

Forest Regeneration Assessment Series

4 | A Guide for Leading a Woodland Regeneration Assessment Event





AUTHORS

Leslie Horner, Forest Stewardship Program Associate
Penn State University

Allyson Muth, Assistant Research Professor, Private Forests Management
Penn State University

Jim Finley, Professor Emeritus
Penn State University

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Introduction

This guide accompanies the *Forest Regeneration Assessment* publication series by the Center for Private Forests at Penn State in the College of Agricultural Sciences. Its development was funded by a national Conservation Innovation Grant through the Natural Resource Conservation Service (CIG 16-042). The goal of this publication is to facilitate planning for events using the Regeneration Assessment protocol to support education and learning about the importance of regeneration, the process of creating it, and understanding the threats that challenge its success.

As a user of this guide, you likely have experience stewarding forests and want to help other landowners use the *Forest Regeneration Assessment* to evaluate forest regeneration to identify potential actions. Landowners helping landowners with forest stewardship and sharing resources is important. Your role is to facilitate peer learning; it is not about replacing a professional forester.

Peer Learning Builds Awareness and Fosters Action

Inadequate forest regeneration is a top concern for Pennsylvania's forests. Many woodland owners – as well those who do not own woods – believe forests will grow healthy on their own. Today, the opposite is true. Active woodland stewardship that considers successful regeneration supports tree species diversity, wildlife habitat, and is key to reducing forest stressors that affect woodland health and productivity.

The goal of this publication series is to increase landowner awareness of challenges affecting successful regeneration and identify actions that can improve conditions in their woodlands. Relatively few of Pennsylvania's nearly 750,000 woodland owners have a plan for caring for their woods and many have uncertainty about where to start.

Woodland owners trained in peer education working with forestry professionals using this assessment can help other woodland owners increase their confidence to become active forest stewards. This publication provides guidance to plan a field day, with strategies to reach target audiences, encourage participation, and build confidence to lead a woodland regeneration demonstration. Of course, it also provides tools to work informally with neighbors and family.

Engaging Woodland Owners: Meeting People Where They Are

In helping others to understand successful regeneration, you will guide owners to use the assessment, and share your experiences. Remember to listen and to invite other's perspectives as well. The goal is for you to use the *Forest Regeneration Assessment* as a conversation starter to help others broaden their understanding of their land, to connect with other woodland owners, and empower people to engage in active woodland stewardship.

The Sustainable Family Forest Initiative (SFFI) at Yale University describes engaging landowners in taking the first step, then the next steps, with nudges and assistance as the ladder of engagement (www.engaginglandowners.org). Figure 1 on the following page shows the SFFI ladder. Creating a sample ladder of engagement when working with a woodland owners association or other groups can help you think about barriers to action or understanding which then leads you

to consider resources, events, and assistance to help landowners climb to the next step.



Source: Engaging Landowners in Conservation – A Complete Guide to Designing Programs and Communications. Sustaining Family Forests Initiative. Yale University. 2019.

Figure 1. A Sample Ladder of Engagement

Types of Landowners

While landowners often share the same values and objectives, there is no “typical landowner.” Numerous studies have repeatedly identified the range of woodland owner experiences, motivations, and values. The SFFI has developed four typologies of woodland owners, based on national surveys and other research (<http://www.engaginglandowners.org/>). Familiarity with these landowner “types” is helpful in several ways—particularly when advertising and finding messaging that reaches and motivates others.

Woodland Retreat Owners...

- value the beauty, conservation, and recreational opportunities their land provides.
- love spending time in the woods and have a strong stewardship ethic.
- may believe that woods manage themselves, and we should not interfere.
- likely lack knowledge of actions to take.
- may own small land parcels, making it more difficult to find service providers.
- seek information about choosing trusted foresters and loggers and how to improve wildlife habitat.

...and, they represent 45% of woodland owners in the US and own 33% of the woodland nationally.

Working the Land Owners...

- value the beauty and recreational opportunities of their lands, but also have financial reasons for owning woodland.
- are interested in maximizing financial returns without hurting the land ecologically.
- may have fixed ideas about what is good for the woods.
- seek information about how to choose trusted foresters and loggers and how to improve wildlife habitat.

...and, they represent 24% of woodland owners in the US and own 31% of woodland.

Supplemental Income Owners...

- emphasize financial aspects of land ownership, for timber income and investment.
- are concerned with long-term health of the land.
- likely own large acreages and intend to pass it along to heirs.
- seek information about estate planning and maintaining their woodland legacy, as well as emerging threats and invasive species and cost-share programs.

...and, they comprise 16% of woodland owners in the US and own 23% of woodland.

Uninvolved Owners...

- don't cite financial, recreational, or aesthetic value of owning woodland as particularly important to them and in many cases do not live on their land.
- are most likely to sell their land compared to the other landowner types.
- seek information on ways to keep land maintenance and management costs low.
- seek information about estate planning and land transfer, but may be most at risk of selling land for non-forest use.

...and, they comprise 14% of woodland owners in the US and own 13% of woodland.

Segment analysis summarizes large data sets by sorting on multiple measures or variables. The four landowner types are useful in understanding that landowners express different values toward their woodlands. Typologies such as these do not describe individuals necessarily; they are primarily useful for identifying needs and interests broadly for designing marketing or outreach initiatives with the intent of appealing to groups or types. For example, a message that conveys ideas relating to aesthetics or recreation has a high likelihood of engaging *Woodland Retreat* and *Working the Land* owners; however, that does not mean that it would not appeal to the other two types. Similarly, a program advocating for increased harvesting and income could appeal to all owners but is more likely to attract attention from those in the *Supplemental Income* type. Knowing your objectives and appreciating that not everyone shares all values or perspectives are important in developing outreach and marketing programs. Getting to know your audience is important to success and involves listening and learning.

Peer Learning and Some Basics of Adult Learning

What is peer-to-peer learning? In short, it describes the process through which landowners learn by sharing their experience and knowledge. It is a two-way (or more) dialogue which recognizes that each participant has the potential to be both teacher and learner.

Adult learners are usually fairly self-driven in seeking out educational opportunities. They look to answer a question or meet a need. Their interest is piqued, and they take the initiative to find answers. Adults value their lived experience and make sense of new information in terms of what they already know or have experienced. They seek out learning opportunities that fit their lives and their preferred learning style. Adults then evaluate what was learned in terms of development of competence, skill gained, or questions answered. As adults, we often seek out less formal environments for this learning to occur.

Why is peer-to-peer learning so important to the *Forest Regeneration Assessment* outreach and engagement strategy? While people often accept advice from trusted experts, interacting with peers who share similar concerns and experiences is reinforcing. Someone “like me” can often share successes and failures, challenges, and opportunities in a way that helps others see where issues may be and what resources are available.

Advice about Reaching “Beyond the Choir” Landowners

Many woodland owners associations and other groups experience lulls in membership and leadership transition. To grow, they need to reach and engage other landowners. There are many reasons and opportunities to grow organizations. Across the Northeast, the number of woodland owners is increasing as larger parcels are broken into smaller parcels. New and old woodland owners are searching for information. Owners do not know how to find a forester, what to discuss, or who else might help them.

Direct mail is an easy way to reach a broad audience. E-mail is not always reliable for reaching people, especially across varying demographics. To make direct mail more effective, make it distinct from other mail. For example, to reach woodland owners to implement this Conservation Innovation Grant (CIG 16-042), project personnel engaged the county Tax Assessor and/or Geographic Information Systems (GIS) coordinator to obtain lists. Some counties have searchable ownership databases. In some cases, landowner lists are available at a price; others are free.

Tips for Tackling a County Landowner List

- Microsoft Excel is the most common format used by county government to share landowner lists. If you are unfamiliar with Excel, look for online tutorials that illustrate sorting.
- Since most listings do not identify land cover types (e.g., agriculture, forest), we have found it useful to select and delete owner lines with acreage less than 10 acres. This reduces mailing costs and increases the likelihood that a given ownership may include woodlands.
- To preserve the original county listing, create multiple sheets/lists containing reduced lists and sorts you choose to make.
- Sort categories to identify target audiences:
 - Absentee owners (sortable by zip code listed in the mailing address)
 - Corporate owners
 - Public owners (e.g., county, state, federal)
 - Family trusts
 - Real estate companies
 - Utilities

Informal peer-to-peer, or neighbor-to-neighbor learning plays an important role in fostering active forest stewardship. Take advantage of natural curiosity and invite neighbors to visit a project you have implemented. Controlling invasive plants is an excellent example to share with neighbors. Often landowners do not recognize the threat of exotic invasive or competitive plants. Your efforts can serve as an example of an important stewardship activity. By sharing, you can enlarge

the discussion and encourage others to work to steward your shared landscape to achieve woodland health and vitality. Take the time to learn from your peers and your shared values toward woodland stewardship. By doing this, you build community where people care about the land and each other.

Woodland owners share many values and interests, including appreciating the peace and solitude found in their woods. Studies find that most woodland owners rank solitude high and timber harvesting low among reasons for owning woods. Nonetheless forestry educators know landowners are susceptible to “select” harvest without involving a service forester or consulting forester. Foresters and many landowners know that “select” or “selective” cutting is a red flag, as it removes the large trees from a stand and expects the smaller trees to grow back. As you’ll recall from the sections on light and succession, it actually decreases species diversity and removes the strongest trees from the stand. You can help others understand why and how this type of harvest often results in degraded woodlands. Rather than taking a shaming or confrontational approach, use demonstrations, conversation, and shared experiences – including mistakes – to build confidence and willingness to learn together.

If you have a service forester and/or consulting forester walking your woods with you, invite neighbors or family members along. It is a good way to build connections and stewardship among family members and the land. It is also one way to introduce neighbors to some of the resources available and may motivate them to meet with a forester on their land.

Planning a Woodland Health and Regeneration Assessment Field Day

General Tips

- Tap into common motivations adults have; for example, learning something new, feeling confident, recognizing a problem, wanting to affirm they are doing the “right” thing, learning a life skill.
- Whether hosting a field day through an organization such as a woodland owners association, or having an informal workshop with friends and neighbors, it may be helpful to invite your service forester to help. It may also help to involve nearby peer volunteers or other resource professionals.
- Adults want to know why they need to learn “X” before attending a training. Let them know what they will learn, how they will learn it, and how it is relevant to them as they care for their woodland.

Location

A privately-owned woodland is a great location for a field day provided there is access to good seating for discussion, and access to restrooms. Seeing and hearing about what others have done with their property is especially effective for helping participants relate active stewardship to their own property. Including both successes and failures can contribute to positive learning experiences.

State parks, state forests, Extension offices, and county Conservation District Offices can often provide facilities with seating, restrooms, and electricity for an introductory presentation. Contact your service forester to discuss possible locations and partnering in educational events.

A Strategy for Advertising a Forest Regeneration Assessment Field Day

Step 1: Establish Objective(s)

Objective: Landowners receiving the mailing will attend the regeneration assessment field day.

This objective represents the first step on the engagement ladder – get people to come; however, it is only the first step. What are the perceived persistent barriers that impede advancement up the ladder? Thinking further, this field day is a first point of contact with many landowners with the intent to have them engage in woodland stewardship. What will move them forward?

Next step: Landowner attends evening meeting to learn about available services.

Next step: Landowner talks with a forester about stewardship activities in their woodland.

Next step: Landowner chooses to have a management plan written.

Last step: Landowner joins woodland owners association and/or stays engaged in active stewardship.

Step 2: Define Principle Audience

Primary target audience: New or unengaged landowners.

Others appropriate to reach and influence: Landowners who are doing something in their woodland but have not talked with a forester.

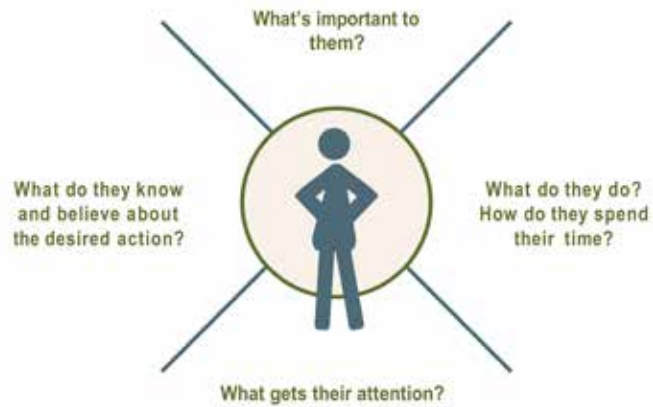
Step 3: Develop an Audience Profile

Goal: To distill reason(s) for action into a convincing message.

To develop an attention-getting, convincing message, make notes about what you (and others working with you) understand about the target audience. For example, workshop advertisements or invitations to join a woodland owners' association should emphasize why the subject is important and why it is important to individual woodland owners. Consider what might motivate landowners, recalling that affirmation is rewarding, and appeal to “doing the right thing” in caring for their woods. Making things easier – finding trusted resources and service providers or improving wildlife habitat – may speak to the audience. Avoid using jargon, as it can cloud the message, especially with less experienced audience members. Think about what the audience values and finds appealing and use easily understood words.

Landowners need to see themselves through others who have similar values. Use photos that show people learning together or listening to forestry professionals or other landowners. Appeal to the audience who wants to learn about their forest. Figure 2 illustrates one way to explore perceptions about the audience.

Alternatively, using examples like those in Tables 1 and 2 can be another approach to define target audience needs and how to create a targeted appeal.



Source: Engaging Landowners in Conservation – A Complete Guide to Designing Programs and Communications. Sustaining Family Forests Initiative. Yale University. 2019.

Figure 2. Exploring the Perceptions of the Audience

Table 1. Targeting the Audience by Assessing Perceptions

| What is important to them? | What do they do? How do they spend their time? | What gets their attention? | What do they know and believe about a desired action, in this case, an event? |
|----------------------------|--|--|---|
| wildlife | well-educated, recreating, bird watching | rare sightings, beautiful settings or wildlife | cut trees = bad |
| legacy | retired professionals, spend time with family | young people in the woods | only seniors will be there |
| | | | |

Having thought about the audience and how the proposed program will encourage individuals to take the first step on the engagement ladder, what does your target audience gain from starting to climb the engagement ladder and what might prevent them from taking this action?

Table 2. Assessing Desired Actions vs. Hindrances to Implementing Them

| Pain | Gain |
|--|---|
| herbicide treatment expensive, time-consuming | will reduce exotic plants, better forest growth |
| expense of hiring a professional to write a plan | provides concrete actions to meet values |
| time/distance to meeting | learn new things |
| | |
| | |

Step 4: Developing the Message

Goal: Invoke action using style and tone. Taking this action will make them feel _____ (e.g., less anxious, proud, connected, involved.)

Messaging should include: 1) specific call to action, 2) compelling reason to take that action, and 3) wording or visuals positively addressing one or more potential barriers to acting.

Four categories that effective messages fall within:

- The action solves a perceived audience problem.
- The action conveys a benefit.
- The action acknowledges a personal value.
- The action is normative – they are doing what others they respect are doing.

Examples of some marketing messages:

Message: Landowner doing the right thing

- Visual: Landowner or logger marking or looking at trees
- Other prompts: social norms (e.g., others like you), stewardship ethic (e.g., leaving it better than you acquired it), etc.

Message: Making the best decisions for the land

- Visual: Group of landowners talking, conducting assessment
- Other prompts: stewardship ethic (e.g., your connection to the land means you want to make it better)

The example postcard in Figure 3 gives an idea of how to use targeted messages to attract landowners to a forest regeneration assessment workshop in Bradford County, Pennsylvania.

Step 5: Choose Media Outlet and Program Location

- Think local – Where do people gather? What local media can be used (print, radio, newspaper)?
- Get the message out 4-6 times/ways.
- Get the timing right – periodic, intensive spurts of advertising (twice in one week, for example) rather than messaging being spread over a longer period. People are more likely to remember two messages within a week, for example.

Example:

1. Postcard – mailed one month in advance of event
2. Print ad in newspaper (two to three weeks before event)
3. Radio spot (two to three weeks before event)
4. Email landowner listserv (from woodland owners association, other organizations)
5. Drop postcards in public spots landowners visit

At-the-Event Peer Leader Teaching Practices

- Introduce a program by covering the learning objective and encourage conversation around information and experience. Set a conversational tone and minimize the “expert” role.
- Link specific learning objectives to the larger question. This emphasizes that individuals are part of a community concerned with forest stewardship.
- Gather people into a circle, again building involvement and community, where participants can hear and share. If a circle is not possible, stay to the middle of the line and exercise leadership by pulling people together to focus on specific learning and discussion points.



Join Us! **SATURDAY, AUGUST 24**
10AM TO 3:00PM

- MEET WOODLAND OWNERS IN BRADFORD & SULLIVAN COUNTIES
- LEARN HOW TO ASSESS THE HEALTH OF YOUR WOODS, ENHANCE WILDLIFE HABITAT, AND PROMOTE TREE SEEDLING GROWTH
- GAIN INSIGHTS FROM LOCAL FOREST EXPERTS
- HELP KEEP OUR NECK OF THE WOODS HEALTHY AND DIVERSE

WHERE:

HOW:

*This event is FREE, but please
RSVP by August 22.... LUNCH PROVIDED*

Dress to be in the woods, short distance hiking is involved.

Hosted by Bradford-Sullivan Forest Landowners Association,
PA DCNR Bureau of Forestry, & the Center for Private Forests at Penn State

Figure 3. Sample Postcard to Promote an Event

- Avoid jargon and technical language - if necessary, define or explain. Use language that resonates with people.
- Allow information and experience sharing. Know when to manage conversations, which may get too far off topic.
- Use every opportunity to involve senses to assist learning. For example:
 - teach plant and tree identification using texture, scent, sound, and color as well as specific features
 - describe differences between similar species
 - link plants to site characteristics
 - tell stories to make connection

- Take advantage of teachable moments. Engage participants in finding solutions to questions. Link ideas to help with discovery and learning. Build excitement. Make it fun.

Use Talking Points to Engage Participants

- In Pennsylvania, regeneration is often inadequate because of competitive plants, deer, and light conditions.
- Forest researchers and managers are emphasizing practices to increase forest resilience to future threats like insect pests, disease, or weather extremes by increasing age structure and species diversity.
- The event goal is to help woodland owners understand conditions in their woods, and to identify appropriate decisions and actions.
- In the context of *Forest Regeneration Assessment*, the goal is to create an understanding about the importance of implementing practices to overcome barriers to regeneration.

Wrapping Up

At the end of the day, make sure you have discussed those activities that could improve regeneration conditions. Help woodland owners consider where their forest is in stand development, where challenges may be, and especially resources to address those challenges.

Once you've piqued someone's interest in understanding more about their woodlands, it's useful to then direct them to resources to further their education, and technical service providers who can help them undertake a more scientific assessment and who can then give advice based on their values, land, and forest, and perhaps undertake the work. Recommend that landowners take advantage of the help that a Service Forester can offer, even before they contact a consulting forester. Mention meeting times or how to become a member of a nearby woodland owners association. Sharing your experiences and local knowledge is an important part of helping others along in their woodland stewardship journey. Connecting landowners to the larger community of peers and resources will further their education and care for their woodland.



- THE CENTER FOR -
PRIVATE FORESTS

The Center for Private Forests at Penn State
416 Forest Resources Building
University Park, PA 16802
(814) 863-0401

ecosystems.psu.edu/private-forests



PennState
College of Agricultural Sciences

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