Summary of Baseline Research

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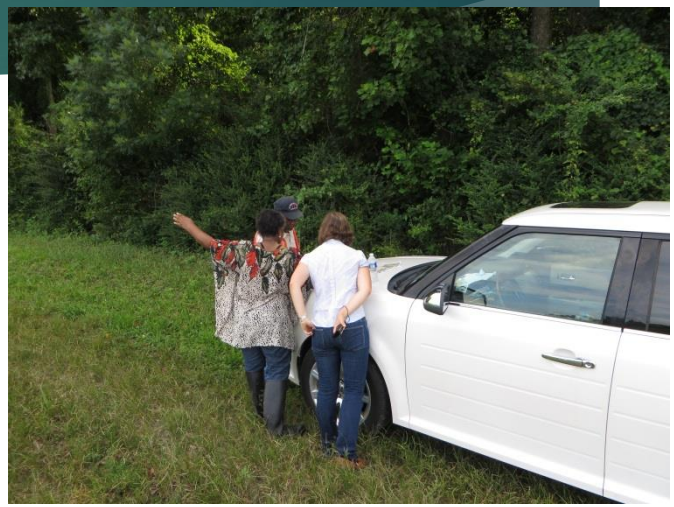
Greensboro, NC. March 23, 2016

Baseline Research

- **Purpose**
  - Gather data near the beginning of the project on landowner knowledge, experience, and practices
  - Document history of land ownership and forestry
  - Learn more about and document landowners' goals and objectives for their lands and forests

- **Usefulness**
  - Help measure change and progress
  - Provide another perspective on needs and desires
  - Get some feedback on early project activities
  - All of the above can shape current and future project activities
  - Add to scholarship on African American forest owners

Baseline Research Methods



Rapid Appraisal Qualitative Sampling:

- 20 landowners each in SC, NC, and AL
- Half core program participants, Half less involved
- Purposive sample to represent diversity
- Introduction by project personnel
- Conducted at or near land when possible

Demographics

- Interviewed one or more family members, with >10 acres
- Age: 50+ (like most forest owners)
  - 8.3% < 50. 67% 51-70. 25% > 70
- Nearly all had Bachelor's or advanced degrees
  - 73% had 4+ years of college
- Professional employment common, particularly in education
  - 62% retired
- Income varied -- mode in $50,000 – 100,000 range
- Gender diversity
  - 35% male. 39% female. 27% couples

History and meaning of the land

- **Long historical ties to the land**
  - Multi-generational
  - Residence on land or frequent visits since childhood
- **Stories of struggle to obtain and retain land**
- **Many stories of land loss**
  - Details include economic hardship and theft
- **Some had more recent land purchases**
- **Most early memories of land related to farming, subsistence and cash cropping**

Value of land to the family

- **Land as tie to family heritage and history of primary importance**
  - Hard work, struggle, responsibility
  - Identity
- **Land as an economic asset**
  - 50% say that it costs money to have land
  - 25% break even
  - 12% make money
- **Land's role in risk reduction** (place to stay, collateral)
- **Cultural value of land ownership**
- **Family reunions on land bring family back**
- **Minority communities/ethnic enclaves (SC)**

Ownership and Taxes

- **Broad definition of heirs' property: all inherited land regardless of title**
  - Tradition versus legal status
- **Complexity of legal heirs property situations**
  - 27% had legal heirs property
- **Taxes:** Single or shared payments?
- **Ways of dealing with it:**
  - Divide and go your own way
  - Informal division/separate tax parcels
  - Divide and manage together
  - One or more designated heirs
  - Buy out other heirs
  - Joint ownership, LLC, or trust

Future generations

- **Very strong desire to retain land in family:**
  - Often one or several family members engaged with land and history
  - Both for heritage and economic reasons
  - "Each generation must carry the torch"
  - Desire to sort out now for next generation

- **Upcoming generations: fewer ties to the land**
  - Current generation is last that worked the land
  - Forces pulling people away: age and life cycle, distance, urbanization, technology, familiarity

- **"Never sell the land"**
  - Strong message to upcoming generations

About the land

- 52% had between 21 and 100 acres; 35% >100 acres
- Some farm or pasture land (usually leased)
- Natural regrowth of forest
- Old houses, cemeteries, memory places

Desired uses of the land

- **Forestry** (new, related to program)
- **Family gathering place**
- **Educational and recreational center**
- **Hunting** (family/friends or leased)
- **Wildlife preservation**

Experience with forestry activities, plans, and programs

- **Many (50%) had sold timber—contacted by buyer or due to financial need**
  - Often suspected they were underpaid
  - A few had contacts to learn prices
- **Few (27%) had planted trees**
- **Very few (13%) had done prescribed burning**
- **Very few (12%) had forest management plan before program**
- **Very few (15%) had prior involvement with government programs**

Experience with forestry activities, plans, and programs

- **People observed and admired managed forests**
  - Recognized that earlier management would have improved current outcomes
  - "We're happy to be getting involved."
  - Wish the program had been around years ago
    - "We're behind other landowners."
    - "We never had access to this information."
- **Trust**
  - Distrust of government, foresters, loggers, etc.
  - Reluctance to sign papers

Constraints

- **Information:** amount, appropriate, timely
- **Labor and technical skills**
- **Finances**
- **Family agreement**
- **Time**

Information exchange

- **Heavy reliance on program personnel for:**
  - Information and advice
  - Contractor recommendations
  - Reminders to meet deadlines
- **Several people had contacts in industry, government, extension**
  - Fragile networks
- **Several people routinely talked with others about forestry, usually the most involved.**
- **Many talked about people they met through the program.**

Watershed protection, bioenergy, and certification

- **Very little awareness, except:**
  - Through profession or public service
  - Through program
- **Interest in learning more**

Other goals and objectives, including buying or selling land

- Many people are just trying to get a handle on what they have.
- Some are actively acquiring more land:
- Buying and selling from other family members
- Few interested in selling, and never family land

Role of the Sustainable Forestry program

- **Primary source of information, advice, recommendations**
  - "I just call [Sam, Alton, Hodges, Andrew, Alex]"
- **Connecting landowners**
- **Integrated activities of the program are getting people's attention at different levels**

Future Research and Extension

- **Rapid appraisal gave snapshot of issues.**
- **Future research on:**
  - Social networks and diffusion of innovation.
  - Landscape scale benefits of resolving heirs property, e.g. watershed benefits.
  - Intra-family dynamics and issues in heirs property and land management.
  - Paper with Thomas Mitchell on Uniform Partition of Heirs' Property Act
  - Other states (Georgia)
- **Distilling lessons learned and sharing them across the South and other areas.**
- **U.S. Endowment and USDA recently have committed additional funds to continue pilot projects and start new projects in additional states.**

Thank you!

- Observations
- Questions