

# Research and Extension Effort Targeting Underserved Forest Landowners in the South Central United States

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## Abstract

A combined research and extension effort targeted underserved forest landowners in the south-central United States. An “underserved landowner” was defined as one who had not utilized the various federal, state, or local resources available. This paper examines selected results of a mail survey completed by 1,689 landowners, and describes small forest landowner workshops conducted in Arkansas, Louisiana, Mississippi, and Tennessee. Selected mail survey data are reviewed. The most frequently cited reason for owning forestland was “As an estate to pass on to my children or heirs.” However, almost 40% of landowners did not have a written will or trust. A majority of landowners are not taking advantage of the numerous programs and activities available to them. A total of 1,302 people attended the 16 workshops, for an average attendance of 81.4 people per workshop. Participants owned 107,153 acres of forestland and estimated the value of the information received at \$6.8 million. Of various publicity methods, letters to individual landowners were the most effective way to inform landowners of the upcoming workshop.

## Keywords

Underserved forest landowners, mail survey, landowner workshops

## Introduction

Forestland is a major land use in the southern United States and offers both environmental and economic opportunities to landowners. These opportunities are the result of an extensive forestland base of more than 200 million acres, forest ownership dominated by more than 1.5 million non-industrial private forest (NIPF) landowners, highly productive forests, and diverse timber markets (Powell et al. 1994, Hubbard 1999, Jones et al. 2001).

Unfortunately, many NIPF landowners are not realizing the full benefit of their forestland. Landowners with small- to mid-sized tracts of land generally lack forestry knowledge and training, thus making their lands less productive and more often neglected than other ownership categories. This situation is particularly acute among minorities, females, and other landowners not generally served by current federal, state, and local programs. Landowners are frequently unfamiliar with the maze of federal and state agencies and programs available to them, and thus make limited use of these resources. Additionally,

landowners are either unaware of, or perceive that they cannot afford to pay for, private consulting services. For the purpose of this project, we have identified these owners as “underserved forest landowners.”

This paper describes a combined research and extension project conducted to enhance the management of farm and forestland owned by underserved landowners in four states in the south-central United States (Arkansas, Louisiana, Mississippi, and Tennessee). A key element of the research component involved mail surveys to gain new or updated information on landowner perceptions and attitudes related to forestry, as well as socio-demographic information. The extension component consisted of a series of workshops to address many of the needs that underserved forest landowners have.

## **Methods**

### **Research component**

The research focused on a mail survey of landowners to obtain new or updated information about them, their attitudes, and perceptions related to forestry. To accomplish this, a questionnaire was developed, pilot tested, and mailed to 6000 randomly selected landowners (1,500 per state). Multiple mailings were used in the questionnaire implementation (Dillman 1978, Salant and Dillman 1994). A reminder postcard was sent to non-respondents during the week after receipt of the initial mailing. One follow-up mailing of a cover letter and questionnaire instrument was sent to those who had not responded after the third week. A business reply return envelope addressed to Mississippi State University was included in all questionnaire mailings. All data was statistically analysed using the Statistical Package for Social Scientists (SPSS).

### **Extension component**

The key extension component of this effort was a series of landowner workshops conducted in participating states. Each workshop required a diverse local planning committee to plan, promote, and conduct the workshop. Committee members included landowners, local forestry association members, Extension personnel, state and federal personnel, ministers, local government officials, and other key community people. We publicized each workshop extensively. We obtained from tax rolls a list of landowners owning 10 or more acres of forestland and sent each landowner a letter explaining the workshop agenda and inviting them to attend. Some tax roll information was unavailable, and in such cases we relied on more traditional means of advertising.

An important point about the landowner workshops is that all landowners were invited to attend, not just those deemed underserved. This is because most forest landowners are underserved. That is, most have not recently used the

services of the many federal, state, and local efforts designed for their benefit. Also, those deemed to be “served” can also benefit from the information provided at workshops, as new materials are continually being developed for these presentations.

### **Workshop format**

Each workshop lasted approximately three hours, and was conducted on a Saturday morning or a weeknight. The format was subject to change given local needs, but generally consisted of the following:

1. Welcome/Introductions
2. Landowner Perspective (local landowner)
3. Ownership Issues (local attorney)
4. Marketing and Environmental Issues (forester)
5. Economics of Forestry (forester), and
6. Question-and-Answer Session.

The “Landowners Perspective” was a personal account by a local private landowner of their experiences in managing their forestland. These accounts frequently included both “good” and “bad” experiences of the landowner, but the important point was to illustrate that properly managing forestland significantly benefits individuals and families. Next, an attorney discussed “Ownership Issues.” The primary issues included the importance of: 1) a written will, 2) obtaining clear title to the land, and 3) a written contract when selling or marketing timber. Attorneys frequently used real-life examples to illustrate complex issues facing current and future generations if landowners do not obtain appropriate legal help. We specifically avoided discussing estate planning because this complex topic could be the subject of its own workshop. While estate planning is important, it did not fit into the time frame for the workshop.

A forester discussed “Marketing and Environmental Issues.” These topics, though apparently dissimilar, actually work well together. A landowner in the process of marketing his/her timber should also seek to protect the environment from logging damage. The forester communicated why “marketing” the timber is better than just “selling” it to the first interested buyer. The forester also addressed the importance of management in meeting the objectives of the landowner and improving monetary returns from this significant investment. Finally, the forester addressed the importance of environmental issues, including Best Management Practices (BMPs) in reducing erosion and protecting stream water quality. Where applicable, endangered species were discussed, along with management modifications required to meet the needs of those species.

Another forester then discussed the “Economics of Forestry.” This addressed the basic question, “Can I make money growing trees?” It was pointed out that the South is the primary timber-producing region in the U.S., and produces more forest products than any other country or region in the world (Wear and Greis 2003). Projections call for an increasing share of the market demand to shift to the South, particularly the south-central U.S. While we are currently in a market slump (Baldwin and Harris 2003), the overall supply and demand situation bodes well for NIPF landowners in the south-central U.S. (Wear and Greis 2003). Foresters frequently conducted a hypothetical economic analysis showing projected growth and economic returns from forest investments. This situation varied considerably among geographic areas, as pine forests have a different set of constraints and projections than hardwood forests.

The “Question-and-Answer” session was an opportunity for participants to ask questions of presenters and other foresters at the workshop. Through this process we were able to clarify points or address specific concerns of landowners.

An evaluation was included in the handout materials. We collected evaluations at the end of the workshop session and summarized the results. These summaries provided useful information about the benefits of the workshop, as well as information on how participants learned of the workshop.

## **Results**

### **Research component**

A total of 1,689 completed questionnaires were returned. After accounting for the undeliverable surveys, deceased landowners, and landowners who did not own forestland, the combined adjusted rate of return was 30.7% (range 28.9% to 33.9%).

For this project, underserved forest landowners were defined as those who have not obtained assistance from forestry professionals or attended forestry-related educational programs that were available to them. On this account, a series of questions were asked to determine the underserved status of landowners. Eighty-nine percent of landowners do not belong to a forestry-related organization. Sixty-two percent of landowners had not previously used a professional forester. Also, 60% of respondents reported they had not previously received information on forestry. Correspondingly, 86% had never attended a forestry-related educational program. These data demonstrate that a majority of landowners are not taking advantage of the numerous programs and activities available to them.

Overall, 91% of respondents felt owning forestland was a good investment, and 85% believed forest management was a good investment on their land.

Seventy-five percent were not familiar with government cost-share programs and 83% were not aware of government tax incentives for forest landowners. Only 18% of landowners had previously used either government cost-share or tax incentives.

Landowners gave multiple reasons for owning forestland. The most frequently cited reason was “as an asset for my children or heirs.” Ironically, 59.5% of landowners had a written will or trust, indicating that a large number of landowners have not made sufficient provisions for passing their forestland to the next generation.

### Extension component

Table 1 gives data from the 16 workshops. These results indicated that landowners derived great value from the workshops. Landowners felt the information they received would help them earn more money by managing their timber. They estimated the value of the workshops at \$427,156 per workshop, which translates into an economic benefit of \$5,249 per participant. While it is difficult to assess the accuracy of landowner estimates, they are in the best position to know what has, or has not, been done on their land. Also, these figures could actually be conservative, as fewer than half of participants put an economic value on the evaluation. Most participants indicated that they will benefit economically from the workshop, but the impact was either not listed or unknown.

Table 1. Evaluation summary for 16 underserved forest landowner workshops held during 2003 in Arkansas, Louisiana, Mississippi, and Tennessee.

State	Attendance	Average Attendance	Acres Owned	Value to Landowner (\$)	Value per Participant (\$)
Arkansas	433	108.3	41,907	2,054,000	4,744
Louisiana	346	86.5	18,814	2,498,000	7,220
Mississippi	346	86.5	31,228	2,054,500	5,938
Tennessee	177	44.3	15,204	228,000	1,288
Overall	1,302	81.4	107,153	6,834,500	5,249

Attendance was considerably above that normally associated with “traditional” Extension forestry workshops. Attendance averaged 81.4 people, and local workshop planners were frequently surprised because traditional forestry education programs usually average less than 50 attendees. Most importantly, conversations with county Extension agents, USDA representatives, and others

responsible for working with landowners indicated that most participants were “new” to them, thus indicating that we were reaching the targeted audience.

We were interested in how participants learned of the workshop. This will help us plan, promote, and conduct more successful Extension programs in the future. In the evaluation we included a question asking, “How did you learn about this workshop?” Landowners were requested to check all that applied. The options listed in the evaluation included a letter, brochure/flyer, newspapers, radio, church, personal contacts, and other. Figure 1 shows the percentage of responses to this question. The landowner letter (direct mail) was the primary way participants learned about the workshop. This has important implications for Extension programs, as publicity relying on traditional techniques (i.e., news releases, radio, TV) was not as effective, particularly with the underserved audience.

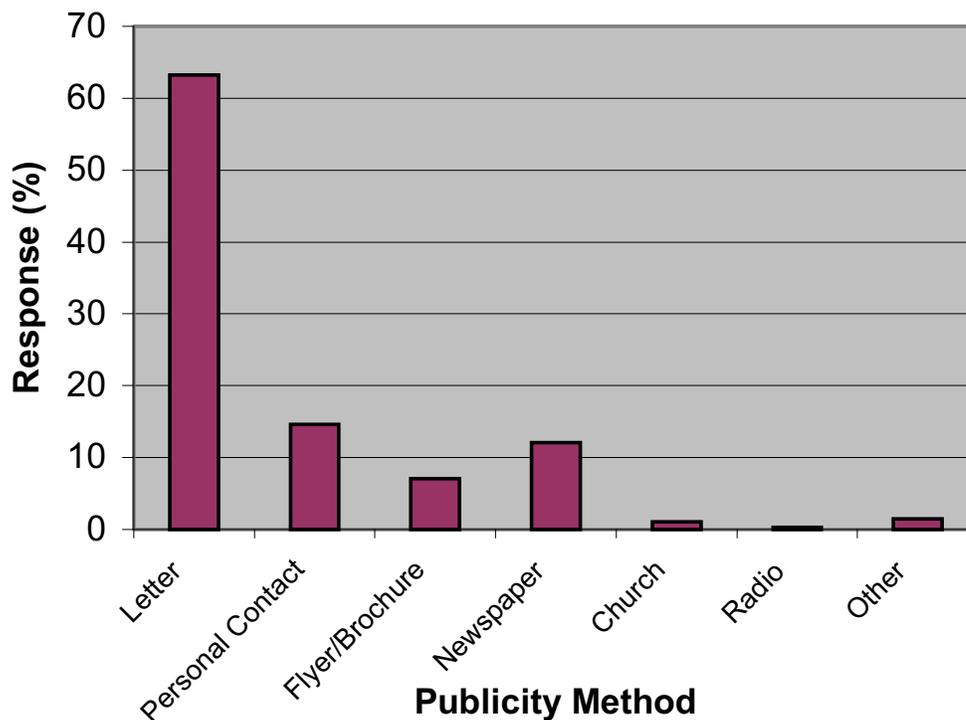


Figure 1. How forest landowners learned of workshops, as indicated on evaluations.

Direct mail was the most effective way to reach forest landowners. However, we will continue to utilize all techniques to publicize our programs. The cost of mailing landowner letters is a concern, particularly with declining extension budgets. Workshop attendance as a percentage of landowner letters mailed averaged 6.6%, or 16 letters per workshop participant. Considering the high costs involved in planning and conducting a workshop for underserved landowners, and the difficulty in reaching this non-traditional audience, this

appears to be a wise investment. Tax roll data can also serve as a database for landowners when conducting future programs.

We were also interested in any change in behavior as a result of the workshop. Specifically, we were interested in whether or not the workshop would encourage landowners to use professional foresters. Research shows that landowners benefit both economically and otherwise when they use a professional forester (Munn and Franklin 1995). Therefore, the evaluation asked two questions in succession. First, "Have you used a professional forester in the past?" Second, "Do you plan to use a professional forester in the future?" Overall, 45% of landowners used a forester in the past, while 90% plan to use a professional forester in the future. This demonstrates a fundamental shift in how participants view foresters. Rather than viewing foresters as a cost, landowners apparently perceive foresters as a benefit or an investment.

## **Conclusions**

This combined research and extension project generated new or updated information on forest landowners in the south-central United States. In addition, four workshops targeting the needs of underserved forest landowners were conducted in participating states. The landowner survey indicated that most forest landowners were underserved; that is, they had not used federal, state, or local resources available to them. The survey also revealed that although the most frequently cited reason for owning forestland was as "an asset for my children or heirs," almost 40% of landowners do not have a written will or trust to ensure an efficient transfer of assets to the next generation.

Workshops attracted larger numbers of participants than more traditional Extension forestry programs. Most participants were "new" to Extension and USDA personnel, indicating we were reaching the underserved landowner. Evaluations indicated that landowners valued the information received, and anticipated greater monetary returns because of the workshop information.

Workshops were publicized extensively, but results revealed that the primary way that landowners learned of the workshop was through a letter sent to the landowner. Landowner databases were developed from tax roll information, and letters were mailed to landowners with 10 or more acres of forestland.

Ninety percent of workshop participants plan to use a professional forester in the future, whereas 45% used a forester in the past. This demonstrated that the workshop successfully conveyed the importance of obtaining professional forestry advice. There is no reason why similar workshops cannot succeed in other areas, particularly those with ownership dominated by NIPF landowners.

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