Acquiring and Managing A Community-Owned Forest:

A Manual for Communities

Swan Valley, MT

Randolph, NH

Arcata, CA

A publication of the Communities Committee
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About the Communities Committee

The Communities Committee is a nonprofit organization made up of a diverse group of urban foresters, environmental activists, private forest landowners, civil servants, forest stewardship practitioners, professional foresters, forest industry representatives, academics, and researchers from across the United States. We believe local participation in stewardship of natural resources is critical to both forest ecosystem health and community well-being.

The Communities Committee was born out of the Seventh American Forest Congress held in Washington, D.C., in February of 1996. This congress brought together over 1400 citizens from diverse perspectives to help establish a common vision for the future of forests in the United States. The Communities Committee was one of several committees formed to continue the work of the Congress, and has become the most compelling and effective champion of the vision and principles articulated there.

Our Mission

The purpose of the Communities Committee is to focus attention on the interdependence of America's forests and the vitality of rural and urban communities. We promote:

- Improvements in political and economic structures to ensure local community well-being and the long-term sustainability of forested ecosystems;
- An increasing stewardship role of local communities in the maintenance and restoration of ecosystem integrity and biodiversity;
- Participation by ethnically and socially diverse members of urban and rural communities in decision-making and sharing benefits of forests;
- The innovation and use of collaborative processes, tools, and technologies; and,
- The recognition of the rights and responsibilities of diverse forest land owners.

The Community-Owned Forests Project

In 2005, the Communities Committee, together with several other sponsoring organizations, held a conference entitled Community-Owned Forests: Possibilities, Experiences and Lessons Learned. The conference brought together citizens, managers and researchers from communities across the United States, as well as Canada and Eastern Europe, to discuss opportunities and challenges of community-owned forests. Our Community-Owned Forests Project, including this manual, is the result of that conference. Through our Community-Owned Forests Project, the Communities Committee provides support and builds capacity for people in towns and cities to learn about and share their experiences of owning and managing community forests. Our website, www.communitiescommittee.org, has extensive resources for community-owned forests, including information on funding, technical assistance, community outreach, and forest planning and management; links to national, regional and local organizations; and websites and case studies of community forests around the country. We also host an email discussion list for asking questions and sharing information on community-owned forests.

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Introduction

Across the country, millions of acres of private forestland are changing hands. Much of this land is at risk of being developed for residential or commercial use, which can cause significant fragmentation of forests and wildlife habitat, and close off local residents' access to outdoor recreation opportunities, hunting, forestry and other traditional uses. Economic development, employment and other community benefits may also be imperiled. Increasingly, forward thinking communities are acquiring and maintaining some of these lands, or rights in them, to protect these forests from possible conversion and to manage them as community forests. In addition to keeping forestland intact, community-owned forests give residents greater control and self-determination in how their communities grow and develop, keep economic benefits from the land in local hands, preserve and enhance local traditions, and allow the community to invest in long-term resource protection.

This handbook provides a guide for communities interested in establishing a community-owned forest. We hope that it will be useful for communities in various stages, whether just beginning to think about a project or re-engaging community residents around land already in community ownership. As the examples in this handbook show, each community forest effort is unique to the local forest and community. Most, however, have several elements in common: outreach and information gathering to engage local residents, partners and decision-makers; an open, inclusive process to determine community priorities and governance structures for the forest; establishing relationships with local, regional and national partners; arranging financing for the purchase; and long-term planning and management of the forest. These steps, outlined in more detail in this handbook, do not necessarily happen in chronological order. Rather, some of this work can take place in parallel depending on the needs of your community and the particular forestland in question.

Part 1. What are Community Forests?

Community forests differ from other private or government-owned forests in the role that local residents play in their stewardship. Local residents are involved in determining the goals and purposes of these forests, developing a governance structure, selecting individuals or organizations responsible for managing them, and in enjoying the many social and economic benefits of the forests. Creating and managing a community-owned forest requires the collaborative development of a community vision and mission for the forest, a commitment to sharing in the costs and benefits of that forest, and the crafting of a governance and operational structure that ensures consistent, long-term management for forest resiliency and sustainability.

Community-owned and community–managed forests are not a new concept, and examples can be found around the world. Some New England "town forests," for instance, were established well over a century ago. Today in the U.S., over 3,000 communities in 43 states own 4.5 million acres of forestland, and these numbers continue to grow (Little, 2005).

A. Benefits from Community Forests

Establishing a community-owned forest protects forest land from unwanted development and gives communities a better ability to shape their future. A community forest also provides many economic, social and environmental benefits for the community, including:

- Protecting water sources
- Providing wildlife habitat
- Outdoor recreation
- Educational opportunities
- Demonstration of sustainable forest management practices
- Income from forestry activities or forest products for community use
- Heat and/or energy for local schools and other public buildings

Water resources in Blackfoot Community Conservation Area, MT. (Greg Neudecker, U.S. Fish and Wildlife Service)

Forestry activities in many community-owned forests provide enough income to cover management costs, and often produce revenue for the town:

- Arcata Community Forest, CA (2 tracts, 2,100 total acres) – Forest Stewardship Council certified and generates $500,000-$700,000 of revenue per year from timber harvesting, of which $245,000 covers management costs and $20,000 goes toward salary for a ranger; forest is self-supporting and excess net revenue is used to purchase and maintain other city parkland and open space.
- Conway Town Forest, NH (1,840 acres) – timber sales generated $81,171 in revenue between 1978 and 2003; revenues go toward additional land acquisition.
- Enosburg Town Forest, VT (120 acres) – a recent sale of 92,729 board feet of timber, 45 cords of wood and 238 tons of chips generated $11,324 in income.

- Hillsboro Town Forest, Starksboro, VT – the Town of Starksboro has used timber from its town forest to build bookshelves for its library, and is conducting a pilot project to use wood chips from its town forest to generate energy for the local high school.
- Mount Washington Valley, ME and NH – a study of 12 town forests showed that they generated $3.6 million over five years in taxes, payments in lieu of taxes and forest land reimbursement.
- Goshen, VT – timber sales and a lease to a local sugarmaker generated over $250,000 in revenue in just over 20 years.

In addition to their economic value, community-owned forests give many benefits that are more difficult to measure – such as providing an outdoor classroom for local students or protecting important historical or cultural sites. The process of establishing a community-owned forest will also build residents' capacity to act together on other community efforts. Moreover, local forest ownership will change how residents relate to the land, fostering an ethic of stewardship. Deborah Brighton of Vermont Family Forests notes, "a community forest makes people owners of working land in their community, and ownership changes the way people think about the land." (Shillinglaw, Morgan and Vaughan, 2007).

B. Changing Forest Ownership

In recent years, privately-owned forestland has been changing hands rapidly, particularly as large timber and forest products companies divest their land holdings. The result is often smaller parcels of forest land and increasing fragmentation of ownership. Since 1978, 20-25% of *all* privately-owned forest land has changed ownership, and since 1996 approximately half of *industry-owned* private forestland. (Little, 2005). Estimates suggest that another 20% of private forestland could change hands in the next ten years. (Block and Sample, 2001).

As ownership patterns shift, forests are increasingly being developed for commercial or residential uses. Research by the USDA Forest Service shows that conversion of forest land to developed uses reached 1 million acres per year in the 1990s. Projections are that in the next 30 years, another 44.2 million acres, over 11% of all private forest land, will experience "dramatic increases in housing development." (Stein et al., 2005).

Development of private forestland has significant consequences for the ecological functions of the forest as well as the communities near them. Loss of forest means loss of wildlife habitat and degradation of wetlands and riparian areas. Communities also lose forest-based businesses and jobs, in both forestry and recreation-based industries. Moreover, much of the forestland in private timber company ownership has traditionally been open to public access. As timber companies sell their lands to other private owners, this access could disappear. In fact, according to the Forest Service, the number of acres of private forest land open to outdoor recreation has been declining in recent years. (Smith and Darr, 2002).

Community members, conservation organizations and government agencies are working to keep some of these lands as contiguous forest through acquisition by land trusts or state or federal governments. However, this option is not always feasible or favored by local residents. Community forests offer a promising alternative for maintaining forested lands *and* for putting in the hands of local residents the critical economic, environmental, recreational, social, cultural, and aesthetic values those forests have traditionally provided.

Part 2. Getting Started

For many communities, the road to a community-owned forest starts when a parcel becomes available for purchase on the forestland market and one or a few determined residents see the potential opportunity to create a community forest. While most community forest efforts start with one or a few local champions, moving from idea to reality will require buy-in and support from the whole community. As initial steps, you will need to assess the interest, readiness and capacity of your local community to acquire and manage a community forest; gather as much information as possible about the forest, and contact key decision-makers and partners.

As you get started, develop a workplan identifying various stages of the community forest effort, a rough timeline, and necessary tasks that must be accomplished. You will likely later need to revise or update your workplan, but having it will help you organize and move forward with this long and complex process. Finally, don't forget to celebrate your victories – large and small – along the way to your community forest.

A. Assess Local Interest

Your effort to seek broader support for a community forest can begin informally by discussing the idea with other residents. Find opportunities to mention the idea as you go about other business – at the coffee shop, post office, grocery store, or other local gathering places. As you talk to other people you will get a sense of whether others in the community are concerned about the fate of the forest, whether there is enthusiasm for a community forest, what potential obstacles might be, and what kinds of activities and uses residents favor or disfavor.

Contact the current owner of the property you wish to acquire to discuss the idea of a community forest. Talking with the landowner will give you an idea of how quickly she wants to sell the land and how favorable she is to community ownership. Also, it is helpful to contact adjacent land owners to inform them of the community forest effort and establish good communication and relationships. Also, contact other communities that have acquired community forests. Those who led efforts in other towns will most likely be happy to share advice and lessons they learned through their own processes and guide you to helpful resources and technical experts.[1]

As you talk with others and build support for a community forest, promote its benefits for your community, but also be realistic and up front about the potential downsides. Residents will ask about possible lost tax revenue from the land, costs of management, the condition of the forest and its potential uses. Some communities have conducted a rough cost/benefit analysis to show how a community forest would affect their town.

Depending on the forest type and condition and community management goals, harvesting of timber and/or other forest products can provide enough income to cover management costs, and in some cases produce modest to substantial revenue for the town (Bisson and Lyman, 2003 – also see Section I. A.).

[1] See www.communitiescommittee.org for a list and links to websites for community-owned forests around the country.

Timber harvest in Arcata Community Forest.
(Mark Andre, Environmental Services Department, Arcata, CA)

Other opportunities for economic benefits might include tourism and recreation, as well as the jobs that forestry, recreation and tourism can provide.

Acquiring a community forest often protects the land from future residential and commercial development. At the same time, resistance may come from residents who fear that the community will lose future revenue that property taxes from new homes and businesses could generate.

It is important to fully evaluate the benefits and disadvantages of a community forest. Development could add to tax coffers, however, many communities find that the cost of providing infrastructure and municipal services to new houses or businesses outweighs any additional tax revenue such development would generate. Moreover, local forests play an important role in providing "ecosystem services" such as filtering the community's drinking water supply, cleaning the air we breathe, protecting local communities from flood damage, providing wildlife habitat and recreational opportunities—services forgone when local forests are turned into new housing and business districts.

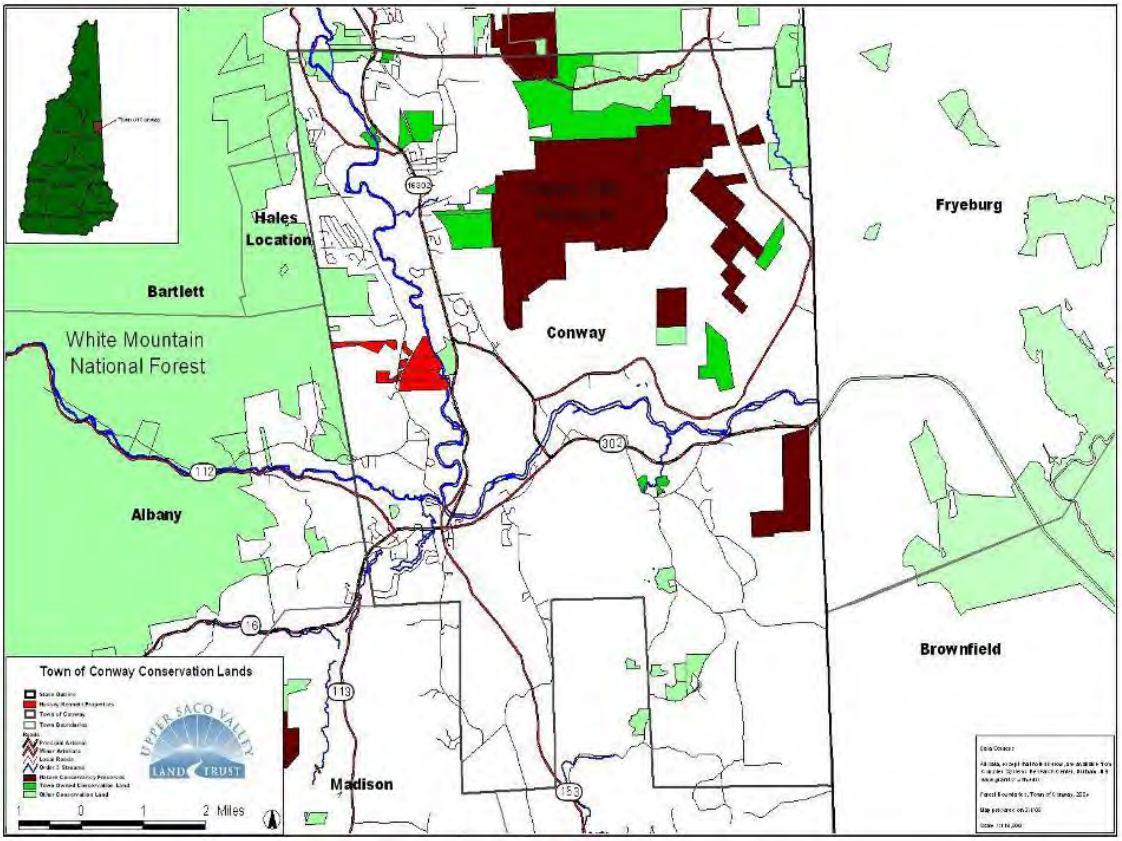
It will also be important to consider the opportunity costs of pursuing local acquisition of the forest. What will your community or organization *not* be able to do if it undertakes this effort? Are there alternatives to local acquisition that would keep the forest intact and maintain its benefits for the community? While the advantages of acquiring a community forest can be considerable, the process is lengthy, difficult at times, and costly. An organizational analysis or assessment can also help to understand your capacity to undertake a land acquisition project, and what you might need to do to get prepared.[2]

In your initial outreach efforts, you will no doubt find enthusiastic supporters willing to help with the effort. At the same time, however, you will likely encounter some skepticism and/or outright opposition. Talking to as many people as possible across the spectrum will help you more accurately assess whether this resistance is an indication that your community is not ready for or interested in a community forest, or rather reflects a minority opinion, however vocal. In the latter case, you will need to engage and activate the "silent majority" of your community that favors acquiring a community forest. You will also want to reach out to those who oppose the idea to understand why they oppose a community forest and whether you can provide information to allay their concerns and objections. You may find some common ground on which you can begin to bridge these divides.

B. Gather Information about the Forest

While you are beginning to promote the idea of a community forest, also begin to collect as much information as you can find about the land you hope to purchase (e.g., management history, tree and plant inventory, etc.). Both current and historic information – acreage, forest type, neighboring owners,

[2] See appendix for additional resources on organizational assessment.



Maps will help show how the forest you hope to purchase fits in with surrounding land uses and ownerships. (Map of town-owned conservation lands in Conway, NH, courtesy of Don Johnson, Forest Land Improvement, Inc.)

major features of the land, previous owners and prior uses of the land – will help you answer questions, evaluate pros and cons, and consider potential uses.

To get started, talk to previous owners, search local archives and ask local residents about the forest and how it has been important to the community. Maps, aerial photographs, and other visual records are helpful to determine property boundaries, roads and trails, existing rights-of-way, and other unique features. They are also good tools for generating support as you talk with other residents informally and attend community meetings to give people a geographic and visual context for the forest.

Your local, county or state foresters can be valuable sources of information about the forest you hope to acquire. They may be able to provide professional assistance or guide you to other sources of professional help. Work with your county or state forester or another professional forester to conduct an inventory of the forest to identify its extent, composition, current and historical uses, natural and historical features, water resources, wildlife, and other pertinent information. Get the most thorough inventory you can, as it will provide important information for every step in establishing a community-owned forest. It will clarify what uses are possible and appropriate for the forest and what parts of the forest are amenable to these uses, provide an estimate of the potential for generating income from timber and/or non-timber forest products, and serve as the basis of a formal management plan. A professional forester can also provide an idea of the cost of long-term management of the forestland. This information will feed into the process of generating broader community support, and will also be necessary as you begin to assemble financing to purchase the land and determine how to support long-term management.

C. Reach out to Potential Decision-Makers and Partners

Early in the community forest acquisition process, identify and contact key decision-makers as well as organizations and other interest groups that might support your effort. You will need to understand how your local government functions and get to know the individual players, including city or county officials, elected and appointed board members, state representatives and other officials, and your Congressional delegation. Determine what local government bodies will play an important role in decisions relating to a community forest – the town council, planning commission, conservation commission, or other relevant committees. Through this process, identify and engage decision-makers who can affect establishment of the community forest. Share information with them and cultivate their support for your community forest effort.

The Tyrell County Community Development Corporation and Youth Conservation Corps are among partners working with the Conservation Fund on the Hoke Community Forest. (Mikki Sager, The Conservation Fund)

Reach out and build partnerships with local groups that are likely to have an interest in the forest - hikers, foresters, birders, snowmobilers, hunters, and other outdoor recreation groups. If any of these groups have regular meetings, ask to attend and get on the agenda to present the idea of a community forest and ask for their feedback and support. Also reach out to state, regional or national groups, such as land trusts or conservation organizations, that may have an interest in and resources to support your project. Partnering with local, regional and/or national organizations – philanthropic foundations, land trusts, community development organizations, local banks, conservation organizations, recreation groups, business owners (particularly those whose businesses are recreation- or forestry-based) – can bring in expertise and resources that will be necessary to the community forest effort.

As you build from "one or a few local champions" to having more broad support from other individuals and organizations, you can begin to incorporate these supporters into your community forest effort. As the effort builds, the workload will increase, so it will help to delegate tasks and spread the work around. Incorporating more supporters will also give more people a stake in the ultimate success of the community forest. Work with the building circle of supporters to assess their interests and capacities, and how they can best fit into the larger community forest effort.

Part 3. Engaging the Broader Community

Once the idea of a community forest gains momentum and support, you will need to initiate a more formal public engagement process. You will want to use an open, collaborative, and inclusive process to solidify support, define community priorities and goals for how to use the forest, and determine the appropriate ownership and decision-making structure for its management. Schedule public meetings and walks in the forest to give ample opportunity for residents to learn about the forest, absorb the information, air out questions, concerns and ideas, and begin to focus on realistic goals.

A. Determine Community Priorities for Use

Every community has different and often multiple needs and priorities for its forest – maintaining open space and scenic values, protecting water supplies, conserving wildlife habitat, providing timber and other forest products, offering outdoor recreation opportunities, and/or serving as an outdoor classroom for local schools and other programs. Various community members and interest groups will no doubt have different priorities and interests relating to the forest, how they envision its future, and what use they hope to make of the forest. A forest inventory is useful in guiding the community's vision for the forest – determining whether proposed uses are compatible with each other and appropriate to the forest.

Case Highlight: Meeting Multiple Community Needs

Hoke Community Forest, North Carolina

The Conservation Fund and Hoke County, North Carolina are working together to purchase 532 acres of forestland near the county seat of Raeford and adjacent to the Fort Bragg buffer. The proposed management strategy aims to restore wildlife habitat, protect riparian buffers, expand recreational access, and provide economic opportunities for local residents. The land includes riparian hardwood forest along Rockfish Creek and a tributary, as well as softwood forest. Long-term management will improve Red Cockaded Woodpecker habitat by thinning underbrush and restoring long leaf pine forest to replace existing loblolly pine. Nearby residents, who currently have limited access for outdoor recreation, will have expanded recreational opportunities, including horse trails, hiking, camping and fishing. The forest will also provide economic opportunities for the community, including harvesting of pine straw, an important and commercially valuable renewable resource, and sustainable timber harvesting.

For more information contact the Conservation Fund's Resourceful Communities Program at 919-967-2223 or www.resourcefulcommunities.org.

Lincoln Town Forest Lincoln, Vermont

In 2001, the town of Lincoln, VT began a process of engaging town residents in determining management priorities for its three town forest parcels. As part of this process, the Lincoln Conservation Commission conducted inventories of each parcel. Through a series of meetings, walks in the forest, and public forums, community members developed a set of priorities for these parcels. The distinct history, ecology and geography of each tract made them amenable to accommodating different community priorities. Because the first tract had a history of logging and contained marketable timber, management for health and diversity of this timber became a priority. The second tract had been monitored for wildlife and served as a wildlife corridor between the Green Mountains and the Champlain Valley. Residents therefore determined that it should be managed for wildlife habitat. The third tract contained non-forested areas and was located near the Lincoln Community School, so residents settled on recovery, civic use and outdoor education as management priorities for this parcel.

For more information please see: *Engaging Residents in Planning for Municipal Forests: A Case Study of Lincoln, Vermont*, National Community Forestry Center Northern Forest Region. August, 2003.

Walks in the Forest

Participants in a workshop at Craftsbury School Forest, Craftsbury Common, VT (Ann Ingerson)

Taking people out into the forest can be a powerful way to build support and mutual understanding among various community interests and begin determining priorities for the forest. First and foremost, it will give residents an opportunity to see what they are considering purchasing, if they are not already familiar with the forest in question. Walks in the woods can also help evoke peoples' values for the forest as they recall their experiences, memories and connections to the forest, such as taking hikes with parents as a child or learning how to fish. Sharing stories and experiences helps people build connections with each other, overcome differences of opinion and find common ground. Residents with apparently opposing viewpoints may see that they have a shared goal of protecting the forest for important community and conservation values.

Community Meetings

Holding community meetings, preferably multiple meetings at various times and places, gives residents and others a chance to voice their views on a community forest and begin determining goals and priorities for its use. Ask residents about their visions for the future of the forest, and discuss how to accommodate different uses – wildlife habitat, recreation, forestry operations, non-timber forest products, education, hunting, water quality protection.

Potential questions for discussion include:

- How much time do you spend in the forest?
- What do you enjoy doing in the forest?
- What do you know about the forest? Do you have memories associated with this forestland?
- What benefits does the forest provide you and the community now, and what would you hope it would offer in the future?
- Are the resources in the forest appropriate to meet those future needs and priorities?
- How have other communities used their community forest?
- Do you support acquiring a community forest and why?
- What local resources are available to help with the community forest effort?

At these meetings, be sure to have maps, photos, reports, inventories and other information on the forest available as displays and/or handouts to inform participants and use as references during discussion. If you have an estimate of management costs or scenarios, make that information available as well. It might also be helpful to ask participants to generate a list of potential objectives for the forest related to recreation, economic values, wildlife habitat, resource protection and other overarching goals. Once you have an exhaustive list, ask participants to rank or number these objectives according to their priorities for the forest. Provide handouts or questionnaires that allow residents to give written feedback as well.

If practicable, use a professional facilitator to help organize and run the community meetings. A facilitator can help structure meetings, such as providing break-out sessions or using particular

communication tools, to get better participation and results. A facilitator will also have techniques for encouraging participation and discussion, ensuring that everyone has an opportunity to voice their opinion, and drawing out those who are more reluctant to speak. Finally, facilitators provide a neutral presence and maintain a distance from discussions that can become emotionally charged. They can be particularly helpful if conflict or contentious issues arise. A skilled facilitator can diffuse tense situations, help community members with differing views to see common interests, and build a level of consensus. [3]

Tips for ensuring good attendance at these meetings include:

- Advertise widely, well in advance, and in a variety of ways – flyers, local newspapers, school newsletters, bulk mailing.
- Consider meetings of different sizes and venues – people may feel more comfortable voicing concerns in a smaller, more informal setting rather than a community-wide meeting.
- If you plan multiple meetings, hold them on different days and at different times to accommodate community members' varying schedules.
- Offer food and child care.
- Take good notes!

Community meeting about creation of Coolbough Natural Areas in Brooks Township, MI (Dale Block)

Based on the priorities and interests identified through meetings, forums, walks or other venues, formalize this vision in writing, present it back to community residents for reaction and feedback, and make necessary revisions. Once the community has reached consensus on its vision, priorities and goals, this written statement will be useful in the process of purchasing the land and will eventually feed into more formal forest management planning after acquisition.

[3] See the appendix for several additional resources on community outreach and engagement.

Case Highlight: Community Outreach and Engagement

Elk Creek Forest, Montana

In the late 1990s, Plum Creek Timber Company started selling its land in the Swan Valley in Western Montana. The Swan Ecosystem Center (SEC), a non-profit community group that works to maintain the valley's rural character, began to work with other non-profit organizations and government agencies to conserve some of Plum Creek's property. Anne Dahl, SEC's executive director, suggested the idea of a community forest for parcels that the federal or state government agencies were not likely to purchase. The idea of a community forest gathered momentum and SEC formed the Swan Lands Community Committee, made up of community members, including loggers, environmentalists, retired foresters, other interested residents, and SEC board members, to determine community priorities for acquisition of Plum Creek lands.

SEC hired a professional facilitator to work with the Committee and take the local community through a nearly two-year public priority-setting process. As part of this process, the Swan Lands Community Committee held two large meetings for public input and feedback, one in each of the two communities within the valley. To attract participants, SEC put up flyers around town, placed notices in weekly newspapers, and sent email announcements. The facilitator ran the meetings and facilitated public discussion and feedback as participants expressed their various interests in the forest.

In addition to these large meetings, the Committee held a series of neighborhood meetings. Local residents on forest roads throughout the valley hosted these meetings in their homes and invited their neighbors to participate. The smaller setting, no more than a dozen or so people, gave residents a better chance to review reports and documents in detail – including maps showing wildlife habitat, timber lands, lands with historic and cultural value, and lands at high risk for development – as well as to comment in a more intimate setting. Being in smaller groups and in neighbors' homes provided a more comfortable atmosphere for people less willing to speak out in a large public meeting. Participants were also less prone to grandstanding.

Through this process, the community identified 13 parcels of Plum Creek land as their highest priorities for purchase based on their value for wildlife and timber management, historic and cultural importance, and likelihood of development due to proximity to roads and town infrastructure. In September 2006, SEC, along with the neighboring Confederated Salish and Kootenai Tribes, took title to their first parcel of former Plum Creek Land to create the Elk Creek Forest. Each now owns 320 acres of land, purchased for a total of $9.6 million with a grant from Bonneville Power Administration.

In the summer of 2008, the Montana Legacy Project was included in the 2008 Farm Bill. The Montana Legacy Project will protect approximately 320,000 acres of forestland that Plum Creek currently owns, including lands in the Swan Valley. Through this project, several of the 13 parcels that the local community prioritized as potential community forestland will become National Forest lands. While the community will not own these lands, it may still be able to meet many community forestry goals through the effective relationships community members have developed with the U.S. Forest Service. The Swan Ecosystem Center will continue to work on community ownership for other parcels.

For more information, contact the Swan Ecosystem Center at 406-754-3137 or www.swanecosystemcenter.com.

B. Potential Structures for Governance

Before proceeding with purchasing a forest, community residents should determine what entity will lead the acquisition process, what organization will own the land and be responsible for its management, and the structure for oversight and management of the forest once it is established. Community members

should know who has final authority for making decisions about how and by whom the forest will be used. Also, if the forest will generate revenue, it is important to decide where the revenue will go and how it will be used, for example to a general fund, toward repayment of a loan for purchasing the land, to a fund for purchasing additional land, or to a separate fund to cover forest management costs. It may be appropriate to address governance structure in your community meetings, or you may find that other factors, such as state or local laws and regulations and even certain funding sources dictate the forest ownership, management, and financial structures.

The Forest Commission and Forestry Team in Randolph, NH (Ben Eisenberg)

Many community forests, particularly in New England, are owned by the local town or county government with oversight by a conservation commission, town forest committee, forest advisory board or other similar body made up of local council members and/or volunteers from outside of the government structure. These committees may have decision-making authority themselves or be advisory bodies to the planning commission, town council or other governing body, which then has ultimate decision-making authority.

Public ownership and management, however, are not the only option for a community forest. As the examples below illustrate, other ownership structures, including non-profit organizations or land trusts, or even limited liability corporations, can incorporate effective and representative local participation in managing the forest and sharing its benefits. Moreover, alternative structures can provide an opportunity to develop new leadership and management capacity among community residents.

Whatever structure your community chooses, the most important consideration is to put in place procedures that ensure representation of diverse interests and stakeholders from your community – local/county government, businesses, recreation/hunting, conservation, education and others. Ultimately, what makes a forest a *community* forest is community involvement in its long-term stewardship.

Case Highlights: Alternative Governance Structures

Little Hogback Community Forest, Vermont

Vermont Family Forests, a non-profit organization that promotes conservation of forest community health and forest community benefits, worked with the Vermont Land Trust and local residents around Monkton, Vermont to establish a privately-owned community forest. Together they have formed the Little Hogback Community Forest LLC, a Vermont limited liability corporation, to purchase a 115-acre forest near Monkton. Sixteen community residents have bought the 16 shares in the LLC, and the Vermont Land Trust holds a conservation easement on the land. The shareholders, the Vermont Land Trust and Vermont Family Forests will all have a say in management, and will jointly approve a long-term forest management plan.

For more information, contact Vermont Family Forests at (802) 453-7728 or see www.familyforests.org.

Blackfoot Challenge Community Project, Montana

The Blackfoot Challenge, a local landowner-based watershed organization in the Blackfoot River valley of western Montana, and The Nature Conservancy formed a partnership in 2003 to initiate the Blackfoot Community Project. The BCP is a joint effort to purchase 89,000 acres of Plum Creek Timber Company land in the valley and re-sell it to a variety of public agencies and private individuals according to a community-based plan.

As part of the BCP and with the help of private funding, TNC will transfer 5,600 acres to the Blackfoot Challenge to own and manage on behalf of the community. This core area will be expanded to 41,000 acres to form the Blackfoot Community Conservation Area (BCCA). The U.S. Forest Service, Montana Department of Natural Resources and Conservation, Montana Department of Fish, Wildlife & Parks, and several private landowners own the remaining BCCA lands.

To ensure that community residents and other stakeholders have a voice in decision making, both in the core and the larger BCCA, the Blackfoot Challenge formed the BCCA Council in August of 2005. The Council consists of 15 members representing adjacent landowners, user groups, and the various public agencies that manage land within the BCCA. The Council has direct management authority for the Core and coordinates the management efforts of the public agencies and private landowners in the BCCA. The Council has held community meetings and conducted surveys of local residents to guide its management of the Core. Through this process, residents identified issues and priorities for the forestland, which the Council has incorporated into a draft management plan. The Council's monthly meetings are also open to the public.

For more information, contact the Blackfoot Challenge at 406-793-3900 or www.blackfootchallenge.org.

Farm Cove Community Forest, Maine

In 2005, the Downeast Lakes Land Trust (DLLT) acquired the 27,080 acre Farm Cove Community Forest, including 62 miles of lake shore. Within the forest is a 3,560 acre ecological reserve buffered by a 3,751-acre late-successional management area. The community forest is being managed for sustainable timber production, wildlife habitat and recreational use. DLLT recently received Forest Stewardship Council certification. Local residents, including guides and business owners, are strongly represented on the land trust Board of Directors and committees. The board makes forest management decisions, based on recommendations from the Forest Resources Committee. Other programmatic committees include the Trails Committee and Education Committee. The community forest secures a large portion of the natural resource base for the local economy - not only through the value of timber harvested and jobs created directly and indirectly from forest management, but also of the clean water and air, protected open space and wildlife habitat, carbon sequestration, and local recreational opportunities, including existing sporting guide and camp industries potential new forms of ecotourism.

For more information, contact the Downeast Lakes Land Trust at 207-796-2100 or www.downeastlakes.org.

Part 4. Acquiring the Land

Often the biggest hurdle for communities seeking to acquire a community forest is assembling the necessary technical expertise and financing to purchase the forest, particularly in a timely manner. Buying forestland is costly, and the real estate transactions involved are complex, often involving more than one purchaser and taking years to come to fruition. Pulling together funds from a variety of sources is also time-consuming. As the cases below illustrate, community forest transactions usually involve several kinds and sources of financing, including grants, donations, loans, and equity investments, as well as participation from many partner organizations. Many communities also find that selling a conservation easement to a government agency or land trust can help lower the market value of the land and bring the acquisition cost within easier reach.[4]

A. Get Ready to Do a Deal

Before you begin to pursue financing for purchasing a community forest, the lead organization or entity must have the organizational and financial capacity to undertake the acquisition and ownership of land. Based on the initial project plan, your lead organization should conduct an internal assessment to ensure that it has the resources, both financial and human, to manage the forest over the long term. Not only is it necessary to have sufficient money to purchase and manage the forest, but your lead organization must also have proper internal controls in place to safeguard its finances. Potential partners, particularly funders, will look for organizational and financial readiness before committing to your project.[5]

Regardless, however, of the capacity of the lead local organization, you will likely need to work with organizations and/or agencies from outside your community that have experience, resources, and technical expertise to navigate the complexities of forestland transactions and pull together the necessary financing. As the cases illustrate, several national and regional organizations have taken part in community forest projects and these groups may have offices in or provide services to your area.

Partner organizations can play many roles, including assisting with negotiations for the land purchase, assembling financing, advising on particular financial tools, drafting easement language, putting together ballot initiatives, providing bridge financing, connecting with state and federal officials, or helping you apply to highly competitive grant programs. These organizations often have a track record with particular funding sources, such as the Forest Legacy Program, and can provide guidance and help make connections with key decision-makers. In cases where the land is likely to be sold before a community has time to raise sufficient funds, a land trust or other partner may even be able to purchase an option or the land itself while you pull financing together.

To successfully engage potential non-local partners, you must know and be able to communicate the importance of the forest you seek to purchase. Thus, the information you have gathered about the forest for local community outreach is equally important in reaching out to partners beyond your community. Most community forest acquisitions require involvement from several non-local entities. These groups—whether national or regional conservation organizations, state or federal agencies, or philanthropic foundations—are more likely to join your effort if the land has some kind of significance related to their mission, such as protecting important watersheds or wildlife habitat, connecting with other conservation

[4] Several books, listed in the appendix, provide detailed guidance on purchasing land for conservation.
[5] The appendix lists and provides links to some resources for assessing organizational and financial readiness.

areas, or supporting rural employment or economic viability. As such, they will want to know about the forest itself, the context of the project, why it's important to purchase this parcel now, and how your effort relates to their mission. Share with them your plan for the forest as well as reports or other information on the biological, economic and cultural resources of the parcel you want to purchase as well those surrounding it. Moreover, take potential partners and funders out into the forest. Showing them the forest itself is a powerful way to convey its importance and will give them an appreciation for your project that words or pictures cannot communicate. If you plan to use public funding, it's a good idea to include your state or federal legislators, who can sometimes be influential in attracting funds.

Potential funders will look to see that you have conducted due diligence in preparing to purchase the forest. You will need an independent appraisal of the forest, ideally by someone familiar with forest transactions and with conservation easements or any particularities of your project, ensuring that the price is reasonable.[6] In addition to a good appraisal, due diligence can also include having a commitment from the buyer to buy and the seller to sell the land and verification of any funding already in place, a property site inspection, baseline data, a title exam and survey, hazardous materials inspection, and mineral and water reports (as relevant).

Also, as outlined above, it is extremely helpful to work with a professional forester to assess the land for both biological and economic values. Potential partners will want to see an inventory of the forest. A forester will also be able to help estimate the potential income stream that the forest could support under different management schemes. This is critical if any of your financing or long-term management priorities are dependent on revenue generated from the forest. For example if you plan to repay a loan with forest revenue, you will need to ensure that the timing and amount of loan payments allow for appropriate and sustainable management practices that will not compromise the forest's long-term health.

B. Financing the Purchase

As the cases below illustrate, purchasing a forest will likely require an array of financing strategies and funding sources. Several potential sources of funding are listed below, but keep in mind that competition for most of these funds is intense. Also, many grants, particularly from federal programs, require a match or cost-share from another source. Grant funds are not the only source of funds for purchasing forestland – most community-owned forest acquisitions have involved some combination of grant funding, private donations, equity investment, and/or loans. Several sources exist for accessing capital at below market interest rates, including foundation program-related investments, tax-exempt revenue bonds and New Markets Tax

The Pond of Safety in Randolph Community Forest, NH – residents contributed over $600,000 toward the purchase, the Forest Legacy Program funded purchase of a conservation easement, and the New Hampshire Land and Community Heritage Investment Program and private foundations provided additional funding. (Ben Eisenberg)

[6] If you anticipate using public funding, check to be sure your appraiser meets state or federal standards.

Credits. Look for "patient capital," or investors whose time horizon is longer-term and in keeping with good forest management practices. Finally, don't be afraid to ask residents for individual contributions, however large or small. If residents are serious about owning a forest, they should be willing to make a financial commitment. Moreover, it gives them a personal stake in the forest and keeps the project more alive in the community consciousness.

Sources of Public and Private Funds

Federal Funding Programs

- Forest Legacy – the U.S. Forest Service administers the Forest Legacy Program, which provides funding to states to acquire fee title or conservation easements on threatened forestlands. Some community forest projects have used Forest Legacy funds to enable the state to purchase a conservation easement, so that the community can acquire the land at lower cost.
- Land and Water Conservation Fund (LWCF) – LWCF provides funding to federal agencies and to states to acquire land or conservation easements. The state portion of LWCF provides matching grants to state and local governments for acquisition, planning or development of outdoor recreation sites.
- Community Forest and Open Space Conservation Program – this new program administered by the U.S. Forest Service provides 50-50 matching funds to help local governments, tribes, and non-profit organizations acquire forest areas that are economically, culturally, and environmentally important to that locality and threatened by development. Program regulations are under development and no funds have yet been appropriated.
- Cooperative Endangered Species Conservation Fund – the U.S. Fish and Wildlife Service administers this program, which funds projects for candidate, proposed and listed endangered species, including land acquisition in support of approved species recovery goals or Habitat Conservation Plans.
- North American Wetlands Conservation Act (NAWCA) Grant Program – the U.S. Fish and Wildlife Service administers NAWCA funds, which support protection, acquisition, restoration, and/or enhancement of wetland and associated upland habitats for the benefit of migratory birds and other wildlife.
- Department of Defense Readiness and Environmental Protection Initiative – provides funding for the military to work with state and local governments, non-governmental organizations, and willing land owners to secure conservation easements to prevent encroachment near military testing and training areas.
- Wetlands Reserve Program – the Natural Resource Conservation Service administers the Wetlands Reserve Program to assist eligible landowners to restore, enhance and protect wetlands. Available assistance includes purchase of conservation easements on wetland within a property and up to 100% of the cost of restoring the wetland.

State and Local Funding

- Land conservation funding programs – some states have grant programs specifically for land conservation, such as the Land for Maine's Future Program. Mitigation funds are another source of funding at the state level. Many states require that when a company develops or builds on sensitive lands, such as wetlands or wildlife habitat, it must offset this damage by paying into a fund that supports conservation or restoration of other lands.
- Clean Water State Revolving Funds – under the federal Clean Water Act, each state manages a Clean Water State Revolving Fund, which provides low interest loans for water quality improvement projects, including projects that reduce non-point source pollution. Several states allow use of these

funds to purchase land or easements to protect riparian ecosystems or protect waterways from non-point source pollution (see Big River and Salmon Creek case, below).
- Local funding sources might include property taxes or transfer taxes .

General Obligation or Revenue Bonds

- General Obligation Bonds – in recent years, many state and local governments have issued bonds for open space and land conservation and may accept applications for use of these funds. You may be able to work with your municipality or state on a bond measure specifically to support your community forest project.[7]
- Revenue Bonds – municipalities can issue revenue bonds to finance revenue-generating projects. Revenue bonds differ from general obligation bonds in that they are secured and repaid through revenue from the project, rather than from taxes or other public resources.
    - Community Forestry Bonds – these are a new type of financing tool designed specifically for community forests. See below for more details.
    - Forestry Conservation Bonds – in the 2007 Farm Bill Congress created this new public financing mechanism enabling enables states or non-profits to purchase important forest lands either through the issuance of tax credit bonds or through direct federal grants.

Private Funding

- Foundation Grants[8] – some foundations, including national, regional and community foundations, will make grants for land acquisition. Before applying to any foundation, however, carefully review its guidelines, as there are often geographical restrictions and very specific policies regarding the types of projects it will support. Many foundations do not fund land acquisition, but support other conservation and forest-related projects. These foundations may be good sources for funding other aspects of your community forest project, such as developing a management plan, restoring habitat or creating recreational trails.
- Foundation Program-Related Investments – in addition to making grants, some philanthropic foundations also provide below-market-rate loans for projects related to their program interests.
- Revolving loan funds – some foundations have established low- or no-interest revolving funds that can provide up-front funding to enable a community to purchase land from a seller who wants to close the deal quickly. This gives the community more time to raise the needed acquisition funds.
- Private Equity – banks and community members may be willing to make an equity investment that would give them an ownership stake in your community forest.
- Private Donations – individuals may also be willing to make tax-deductible contributions if your forest ownership structure permits. Landowners may also deduct the full value of conservation easement donations, or partial donations as part of a bargain sale, to a qualified entity, so it is worth discussing this option with the seller of the land.

[7] The Trust for Public Land maintains LandVote, a database of land conservation ballot initiatives, on its website at www.tpl.org.

[8] The Communities Committee website has a partial listing of private foundations that support land acquisition. See http://www.communitiescommittee.org/COFfunding.html.

Additional and Emerging Financing Opportunities

Conservation Easements

A conservation easement is an agreement between a landowner and a government agency or land trust to permanently limit development and protect certain conservation values on a piece of land. The conservation easement limits the amount of development or other activities that can take place on the land and is binding on current and future owners of the property. The landowner can either sell or donate an easement, and the easement owner is then responsible for monitoring compliance with its terms. Conservation easements are flexible tools tailored to a particular forest parcel and to the needs and interests of the parties to the agreement. By removing the potential for development, an easement generally lowers the market value of the land and can help bring its acquisition more within a community's means.[9] A Working Forest Conservation Easement (WFCE) is a particular kind of conservation easement that, in addition to restricting development, also provides for active management of the land to generate economic value through sustainable forest stewardship. WFCEs can guide forest management practices or management for particular forest conditions or habitats.[10]

Community Forestry Bonds™

Community Forestry Bonds™ are a type of revenue bond developed by US Forest Capital to provide access to tax-exempt bond markets for lower-cost capital to conserve working forestland. With these bonds, a group of conservation, business and other interested parties that want to buy working forestland could work with a municipality or other appropriate government body to issue Community Forestry Bonds™ on its behalf. The bonds would essentially give qualified buyers access to lower cost private capital in exchange for the public benefits provided by the forest. The buyer would own the land in fee simple, use revenue generated from forest products to repay the bond, and continue to own the land once the bonds are paid off.[11]

New Markets Tax Credits

New Market Tax Credits (NMTCs) create incentives for investors to make loans or equity investments in low-income communities by giving them credits against their federal tax obligations in the amount of 39% of their investment over a seven year period. The effect is to lower the interest rate of a loan or make equity investments more attractive. NMTCs can be a useful source of financing for community forests, but not without several limitations. First, NMTCs can only be used in low-income communities, defined by census tract. Second, they are channeled through qualified Community Development Entities (CDEs), which receive the credits through a competitive application process. The CDE must be open to the idea of a community forest as a community development and income-producing project. Moreover, the legislation that creates the NMTC program is unclear on the issue of whether municipalities can borrow through the program. The Town of Errol, NH, which used NMTCs in purchasing the 13 Mile Woods Community Forest, sidestepped this issue by creating a non-profit entity to borrow through the NMTC program. Finally, NMTCs are a very complex financial instrument –any community hoping to make use of this tool will require substantial assistance from someone with a great deal of expertise in NMTCs.[12]

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[9] For more information on conservation easements see: http://en.wikipedia.org/wiki/Conservation_easement and www.privatelandownernetwork.org/plnlo/conease.asp.

[10] For more on Working Forest Conservation Easements see: www.naturalresources.umd.edu/Pages/Workingforestfs/Workingforest.htm and www.forestguild.org/publications/research/2006/Forest_Conservation_Easements_Forest_Guild.pdf.

[11] For more information, contact US Forest Capital at (503) 220-8103 or www.usforestcapital.com.

[12] For more information contact the U.S. Department of the Treasury Community Development Financial Institutions Fund at (202) 622-6355 or www.cdfifund.gov

Case Highlights: Financing Strategies

Big River and Salmon Creek Forests, California

- California State Revolving Fund Loan
- State land conservation grants from the California Coastal Conservancy and California Wildlife Conservation Board
- Private support from the ACE Land Legacy Fund and the Centex Land Legacy Fund

The Conservation Fund purchased 16,300 acres of coastal California forestland in November 2006. As part of its financing for this purchase, the Conservation Fund received a low-interest loan from the California State Revolving Fund for water quality projects, the first time such a fund has been used to purchase working forestland. The Conservation Fund applied for and received a loan to purchase and manage the forest as a non-point source pollution reduction project, based on its ability to improve water quality through improved forest management and silvicultural practices. It secured a 20-year loan for $25 million dollars at an interest rate of 2.3%, well below the current market rate. Additional funding for the purchase came from state grants for land conservation and private philanthropic funds.

For more information contact the Conservation Fund at 415-927-2123 or www.conservationfund.org.

13 Mile Woods, New Hampshire

- Forest Legacy funding for state purchase of conservation easement
- State land conservation grant (Land and Community Heritage Investment Program)
- Private funds channeled through New Markets Tax Credits
- Bank loan
- Bank equity investment
- Loan from land conservation organization

In December 2005, the town of Errol acquired 5,269 acres of forestland for $4.05 million to create the 13 Mile Woods Community Forest. The 13 Mile Woods went up for sale in 2000. The effort to acquire it as a community forest began with the vision of a respected local businessman and civic leader, who recognized the possibilities of local ownership for community and economic development and knew of other community forest efforts in nearby towns. Meanwhile, Lyme Timber, a timberland investment company with expertise in conservation-oriented land transactions, acquired the land. When the town of Errol showed interest in purchasing the forest, Lyme held on to the land while the town assembled its financing.

The Trust for Public Land (TPL) had also been interested in the 13 Mile Woods, and became involved in the community forest effort. TPL had extensive experience in securing funds through the Federal Forest Legacy Program and New Hampshire's Land and Community Heritage Investment Program (LCHIP). With help from TPL, the project received $1.64 million from Forest Legacy for the state of New Hampshire to purchase a conservation easement, and $350,000 from LCHIP toward purchasing the forest.

The remaining balance to reach the purchase price for the land was too much to borrow through traditional means without raising local taxes, which town selectmen had promised would not happen. By involving Coastal Enterprises, Inc., a community development financial institution based in Maine, Errol was able to use New Markets Tax Credits (NMTCs) to make the forest acquisition project more attractive to private investors. With NMTCs, Errol secured a below-market rate loan and an equity investment from a local bank, and another low interest loan from a land conservation organization. In effect, the use of NMTCs reduced the amount of these loans from $2.2 million to $1.68 million. These loans will be repaid with timber revenues from the forest. To fit the NMTC Program, this deal required a complex structure of limited liability corporations and non-profits to channel funds, including formation of the Thirteen Mile Woods Association, a new non-profit entity, to purchase, own and manage the land while the tax credits are in effect. In 2012, title to the 13 Mile Woods will transfer to the Town of Errol.

For more information, contact the Trust for Public Land at 802-223-1373 or www.tpl.org.

Little Hogback Community Forest, Vermont

- "Community Equity" - multiple private owners
- Private donations

Local residents financed the purchase of Little Hogback Community Forest through a limited liability corporation, which bought 115 acres of forestland near Monkton. The community residents own shares in the LLC, which represent an ownership interest in the forestland. A conservation easement owned by the Vermont Land Trust reduced the purchase price of the forest, and additional private donations toward the acquisition covered enough of the cost of the land so that the LLC could buy it at its value for productive use. Some discounted shares were reserved for limited-income owners.

VFF anticipates that shareholders will receive a long-term financial return of approximately 3%, through distribution of net revenues from timber harvests and increase in value of their share as the forest matures. To maintain affordability and local ownership, VFF holds a covenant that allows it to purchase an individual share or the whole parcel at its value for productive use if offered for sale. While the forest is privately owned, it remains open to community residents for recreational access.

For more information contact Vermont Family Forests at 802-453-7728 or www.familyforests.org.

Part 5. Long-term Management and Stewardship

Once your community has acquired a community forest, it is critical to prepare a formal management plan that outlines the community's objectives, management activities to achieve these objectives, and monitoring protocols to assess progress toward stated goals. It is also important to encourage continued community involvement to keep residents engaged over the long term.

A. Develop a Forest Management Plan

Once you have established your community forest, it is critical to develop a written forest management plan to help you reach community goals for the forest. It is important to distinguish between *setting priorities* and *developing a written management plan* for your forest. Priorities and goals, as determined through an open, transparent community process, determine the overall direction and uses for forest land and inform a forest management plan. A written forest management plan, however, is a technical document that provides a blueprint for specific management strategies to meet these priorities, governing activities in various parts of the forest over a set period of time. While broad community input on priorities for forest use is not only appropriate but central to the concept of a community forest, a professional forester should prepare, or at least provide significant input in developing a forest management plan.

Conducting a forest inventory is the first step toward developing a management plan. Hopefully you will already have done this in the course of establishing your community forest. As set out above, an inventory will provide important information on the biological, cultural and economic resources in the forest, and will guide potential uses that are compatible with each other and appropriate for your forest.

With the forest inventory as a guide, the next step is to identify and prioritize community goals and interests for the forest. Again, you may have already done this through community outreach and engagement to establish your community forest. Any process to identify your community's priorities should engage a broad range of community residents and stakeholder groups through meetings, walks in the forest, surveys, and other opportunities for them to identify their goals, interests and priorities for the forest. Part 3 above provides more detailed guidance on structuring a public engagement process.

Finding Professional Assistance

Check with your state forestry agency or cooperative extension office to seek professional assistance. You may also find a professional forester from your community who is willing to volunteer his or her expertise, or you may need to hire a professional consulting forester.

State Foresters – find your state forester through the National Association of State Foresters at www.stateforesters.org

Cooperative Extension Services – find your state cooperative extension office at www.csrees.usda.gov/Extension/index.html

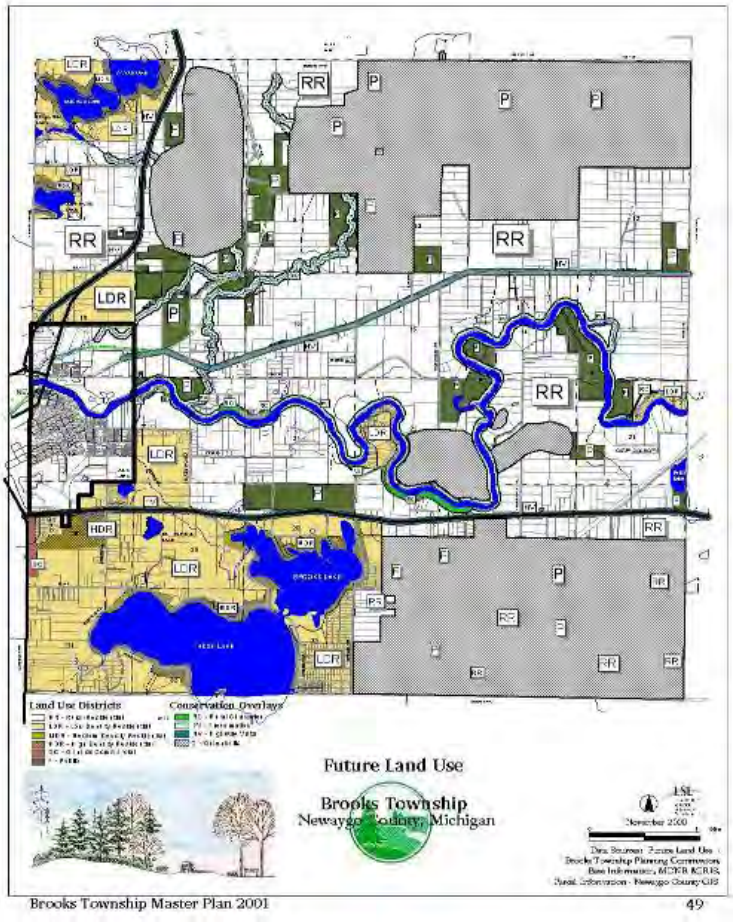
Consulting foresters – find a professional consulting forester through the following organizations:
Forest Guild at www.forestguild.org
Society of American Foresters at www.safnet.org

Based on the community's priorities and goals, the third step is to work with a forester to write a management plan. It may be helpful to consult professionals with expertise in other areas as well, such as wildlife or recreation, depending on the kinds of uses planned for your forest. The management plan should cover a specific time period, such as ten or twenty years, to ensure continuity and consistency in long-term management. The plan will also specify particular management activities and when they

should occur in order to meet the goals laid out by the community. These may include thinning or harvesting trees, enhancing wildlife habitat, maintaining or building trails, and removing or controlling invasive species. Before finalizing and beginning to implement the plan, present it to the public, publicize it widely, and allow for public comment to increase buy-in and ensure that community residents feel it reflects their priorities. Depending on the ownership structure, the municipal government, commission or other governing body may need to formally adopt the plan or incorporate it into the community master plan.

Elements of a forest management plan can include:

- Property Management Goals – long-term vision for the forest developed in the community priority-setting process; potential human and financial resources available from the community to assist in forest management.
- Property description – legal description of the property and number of acres; current ownership.
- Property history – the property's prior owners, uses and activities, including timber harvests, tree planting, trail construction, etc.
- Maps – maps and aerial photographs of the forest, including a detailed map showing features of the forest (boundaries, fencelines, access roads, trails, forest types, soils, and other natural or human-made features), and one showing its relationship to surrounding lands. (Also perhaps the ownership types of adjacent lands – private industrial, other private, state, federal).
- Inventory – information on forest cover and type; physical features, both natural and built; wildlife; soils; water resources and features; other vegetation; it could also include a description of the community; aesthetic/scenic values of the property; special management considerations and constraints; and information on ownership and uses of adjacent lands.
- Management Information – proposed management activities and objectives; timber management and harvesting recommendations; other management recommendations; plans for conservation zones for particular plant or animal species or for scenic and cultural resources; trails and other recreational assets that require maintenance and monitoring.
- Timeline of Activities – management activities to be undertaken in the next five to ten years (what, where, when and why).



Map showing future land use under management plan for Coolbough Natural Areas, Brooks Township, MI

- Monitoring and Evaluation Plans – plan for tracking changes in the forest (through keeping and analyzing records of management activities, scientific monitoring, etc.).

Once the management plan is in place, the forest management committee should work with a professional forester to implement it. The plan will recommend management activities and treatments to conduct over the time period covered by the plan in order to meet the plan's objectives, and a timeline indicating when these should occur. Before significant management treatments, such as a timber harvest, it is a good idea to notify community residents and provide an opportunity for broader input. Host walks in the forest to discuss its current condition, the reason for the treatment, what equipment will be used, and how the forest will look afterwards. If trees will be cut, make sure they are marked so that participants know which trees coming down and which ones will remain. This keeps residents informed and help to allay potential concerns. Also, keep good records of management activities, whether conducted by a professional forester or group of volunteers, to track results of the activities as well as possible costs and revenues.

Monitoring, evaluation and adaptive management are critical to ensuring that forest management meets community goals over the short and long term. Building flexibility and feedback opportunities into the management plan allows for adaptive management to accommodate changes in community priorities as well as alterations based on how the forest responds to management activities. For effective evaluation, you should select indicators or measures for the community's goals as identified in the forest management plan. Your indicators can reflect not only ecological concerns, such as plant or wildlife species diversity or water quality, but also social and economic concerns, such as how your community forest affects quality of life, recreation opportunities, and local jobs or business enterprises. You will need to conduct regular monitoring to gather information on the indicators and link that information back into decision-making and ongoing management of the forest. Monitoring and evaluating trends in your indicators will allow you to track change in your forest and community over time and determine whether those changes are moving toward the community's goals.[13] Depending on what this monitoring shows, you may need to change management practices or particular activities to better meet achieve your community's vision.

A useful guide for indicators of sustainable forest management is the Montreal Process criteria and indicators that grew from the 1992 United Nations Conference on Environment and Development. The criteria recognize the importance of the connection between people and forests and incorporate ecological, social and economic concerns. The seven criteria are:

- Conservation of biological diversity, including ecosystem diversity, species diversity, and genetic diversity.
- Maintenance of productive capacity of forest ecosystems.
- Maintenance of forest ecosystem health and vitality.
- Conservation and maintenance of soil and water resources.
- Maintenance of forest contribution to global carbon cycles.
- Maintenance and enhancement of long-term multiple socio-economic benefits to meet the needs of societies.
- Legal, institutional and economic framework for forest conservation and sustainable management.[14]

[13] The appendix lists some publications that provide detailed guidance on developing monitoring and evaluation plans for natural resource projects.

[14] "Criteria and Indicators for the Conservation and Sustainable Management of Temperate and Boreal Forests," The Montréal Process, December 2007.

Several states have adopted their own forest sustainability criteria and indicators that could also guide development of your monitoring and evaluation plan.

B. Special Management Considerations

Forest Certification

One forest management consideration is third-party certification through one of several forest certification systems. Certification recognizes responsible forest management, will ensure ongoing monitoring of forest conditions and can also increase the value of products that flow from the forest or improve access to specialty markets. However, your community should also take into account the cost of the certification process in determining whether it is appropriate for your forest.

Almquist Lumber sells FSC-certified wood from Arcata Community Forest. (Mark Andre, Environmental Services Department, Arcata, CA)

The three primary forest certification systems in the U.S. are the American Tree Farm System (ATFS), which is open only to private landowners, the Forest Stewardship Council (FSC), and the Sustainable Forestry Initiative (SFI). All three systems require that third party certifiers assess forest management according to the system's principles and standards, and require regular recertification to assure continued compliance with these standards.[15]

Wood-Based Energy[16]

Some communities have turned to their local forest as a source of energy. Shareholders of the Little Hogback Community Forest can request to harvest firewood from their forest. The town of Starksboro is developing a pilot project to use wood chips from its town forest to heat the local high school. This may become a consideration for more community forests, as rural communities often find themselves paying higher than fair market rates for energy and search for ways to respond to increases in gasoline and fuel oil prices.[17] Beyond firewood and wood chips, community forests are a potential source to supply markets for cellulosic ethanol, electric power generation, thermal energy, and combined heat and power (CHP) where they exist. Where markets are not yet established, federal and state incentives are available to attract renewable energy investment in forest-based communities.

New community-scaled cellulosic ethanol and wood-based bioenergy facilities can help rejuvenate wood-products manufacturing economies and provide new family-wage jobs in forest-based communities. Markets that utilize wood for energy can also leave local residents less vulnerable to price shocks in home heating costs from propane and heating oil while keeping energy dollars local. These same markets also

[15] For more information and details see: Forest Stewardship Council: www.fscus.org; Sustainable Forestry Initiative: www.aboutsfi.org; American Tree Farm System: www.treefarmsystem.org.

[16] Jacob Donnay of the National Association of State Foresters contributed this section on wood-based energy.

[17] See the appendix for sources of more detailed information on local wood energy use.

provide new capital to help cover the costs of management practices that sustain community forests' role in providing clean air and water, wildlife habitat, carbon sequestration, recreation and numerous other public benefits.

Markets for wood-based energy are still developing, and the prospect for growth also raises concerns about overharvesting to meet demands. These are among the many economic, social and environmental considerations to take into account in determining whether managing for new renewable energy and alternative fuels markets is appropriate for your community forest.

Motorized Uses

One of the most contentious issues many communities face in determining management priorities for their community forest is how to address the use of motorized vehicles, such as snowmobiles and all-terrain vehicles (ATVs) in their community forests. Communities have addressed this in a variety of ways, from allowing access on designated trails to barring all motorized vehicles from the forest, depending on the particular circumstances in the community. In determining how to address motorized access for your forest, factors to consider include: the size of the forest; potential impact on other management priorities; impact on other recreational uses; historic uses of the forest (e.g. have snowmobiles or ATVs traditionally used the area); liability issues; management of adjacent parcels; and state laws and regulations governing snowmobile and ATV access. Examples of how other communities have addressed motorized use include: separate trails for motorized and non-motorized use; limits on the number of users; requiring a trained and approved guide; and limits on the number of days per week and/or the time of year (e.g. not during hunting season) for motorized use. Also, some communities have distinguished between snowmobiles and ATVs, as they have different impacts on forest resources. Coming to an agreeable plan will require broad participation and potentially significant compromise. Be sure to reach out to local snowmobilers and ATV user groups as part of the public planning process for your community forest. If motorized uses are allowed, these groups can help maintain trails and enforce usage rules. Whatever your community determines for the forest, clear communication and expectations and good signage are critical.

Sign clearly posting usage rules for Whitaker Woods in Conway, NH. (Don Johnson, Forest Land Improvement, Inc.)

C. Ongoing Community Involvement and Stewardship

After your community forest is established, keeping community residents engaged over the long term can be a challenge. However, there are many ways to sustain community involvement, from active participation in management structures or volunteer stewardship activities, to events in the forest, to regular communication through meetings or newsletters. However you do it, getting and keeping residents involved with the forest will help ensure effective local leadership, investment, and stewardship of your community forest over the long term.

Many community-owned forests have multiple levels of management and provide several avenues for public involvement in ongoing planning and management. Generally, a volunteer management committee of community residents provides guidance and advice to the body with ultimate decision-making authority for the forest. The management committee may be elected, appointed or all-volunteer and composed of residents with a particular interest in the forest, representatives of stakeholder groups or organizations, and/or people with relevant professional expertise. Generally speaking, these committees hold regular meetings to discuss current issues with the forest and make recommendations to the governing body. Often this management committee works with a professional forester who implements management decisions once approved.


Arcata Forests Newsletter

Input Sought for Forests' Vision

August 2001
Volume 1, Issue 2

Inside this Issue:

Arcata, California publishes a regular newsletter to update residents about the community forest.

Clear and regular communication is key to maintaining community support for the forest. Keep the regular meetings of their forest management team open to the public as a way to keep community residents informed about what's happening in the forest and provide opportunities for questions and input. In addition, periodic community "visioning" or planning sessions will help ensure that community residents still support the overall goals for the forest. Newsletters are another avenue for reaching residents to inform them of events, meetings, volunteer opportunities and other information about what's happening in the forest. Moreover, public meetings may be scheduled and advertised when key decisions are about to be made – approving a new strategic plan or management plan, contemplating a timber sale, or preparing for other significant management treatments.

Providing opportunities for recreation, education, stewardship and monitoring activities in the forest will help strengthen and build a constituency of ongoing support.[18] Maintain connections with local

[18] See *The Vermont Town Forest Stewardship Guide: A Community Users' Manual for Town Forests*. Chapter 6 contains step-by-step guidance on several community forest educational and cultural activities, including connecting

recreation groups and provide information about hiking, skiing, fishing, hunting and other recreational opportunities to encourage residents to get out into the forest. Getting residents involved in taking care of the forest is another excellent way to strengthen ties to the land. Some towns have a team of volunteer stewards who undertake restoration and maintenance activities, such as trail upkeep or invasive plant removal. Volunteer committees serving under the management authority could address specific issues, such as trails and recreation, invasive species, or wildlife. Local clubs can be a valuable resource in assisting with management activities, helping to defray some management costs through volunteer action. In Randolph, New Hampshire, the Randolph Mountain Club has conducted trail maintenance with both volunteer and paid trail crews. Community volunteers and students can also help with monitoring activities, such as taking soil or water samples, conducting wildlife surveys, or inventorying trees.

Periodic projects and activities centered around the forest, such as a community forest celebration, are another way to generate and maintain interest in a community forest. Guided walks in the forest are a good way to demonstrate forest conditions and show progress toward community goals. It is particularly helpful to hold site visits before, during, and after management treatments, such as a proposed timber sale or stream restoration project, so that residents can see and ask questions about what is proposed and how it will affect the forest. This also promotes open, transparent decision-making and builds trust in the community.

In many towns that have community forests, schools – from elementary to college and graduate levels – use the forest as a hands-on educational resource and living laboratory to learn about biology, ecology, forestry and other subjects. Community forests have educational value beyond the natural sciences – classes have written essays, conducted oral history projects, and even produced videos about their community forest. Getting young people into the woods is not only healthy for their bodies and minds, it also helps ensure that the next generation understands and cares for the forest, and will sustain your community's investment into the future.

Children identifying aquatic insects in Elk Creek Forest, Swan Valley, MT (Anne Dahl)

generations through youth-elder interviews, developing a community forest statement, conducting community forest stewardship projects, and organizing a community forest celebration.

Connecting Schools and Forests

China School Forest, Maine

The China School Forest, located behind the town's primary and middle schools, is a 70-acre demonstration forest that provides a picture of the forest as a dynamic ecosystem, as a source of natural products, and as a recreational resource. It has twelve learning stations that explore topics such as forest management choices, watersheds and riparian buffers, measuring forests and trees, and animal tracking. The school libraries have "Tree Trunks" containing teacher resources, forestry tools and other things to help educators integrate the forest into their curriculum.

For more information see: http://169.244.19.98/~schoolforest/index.html.

Wisconsin School Forests

The state of Wisconsin has a comprehensive statewide program to support school-owned forests and help educators use the forest for environmental education and natural resource management. The program employs a School Forest Education Specialist to provide guidance and consultation in developing school forest education plans, a connection to forest management resources, networking and information through an electronic newsletter and website, professional development for educators, administrators, and natural resource managers, and information about funding sources and education resources. Available resources include information and examples on conducting forest monitoring projects and developing school forest policies and education plans to integrate school forests into the curriculum. The Forestry Lesson Guide provides lesson plans and field enhancements addressing arts, English, math, science and social studies for kindergarten through grade 12.

For more information see: www.uwsp.edu/cnr/leaf/schoolforest.

Part 6. Topical Resources

Community Forest Case Studies

Community Forests: A Community Investment Strategy
The Community Forest Collaborative, 2007.
Outlines a Community Forest Model focused on securing access and rights to the forest resource at the community level; promoting community participation in management decisions; ensuring that communities receive value and benefits from the land that can support and reinforce community priorities and economic development objectives; and securing permanent protection of the conservation values of the forestland. Includes several case studies from Maine, New Hampshire and Vermont.

The Story of the Randolph Community Forest: Building on Local Stewardship
By Brian Willcox, from **Natural Resources as Community Assets: Lessons from Two Continents** by Martha West Lyman and Brian Child. Sand County Foundation/Aspen Institute, 2005.
Details how the town of Randolph, New Hampshire, with a population slightly over 300, acquired a 10,000 acre community forest.

Valuing Forests as Community Assets in the Mount Washington Valley
Bisson, Keith and Martha West Lyman. Mt. Washington Valley Economic Council, 2003.
A study of the economic, environmental, and social contributions of public and private forests and their potential role as a component of a regional economic development strategy.

Community Organizing and Engagement

Some of the resources below are not specific to community forest projects, but are general guides to help organize community residents around a common project or goal.

Choices and Challenges in Town Forest Management
National Community Forestry Research Center, 2003.
A report from a community forest workshop that examined:
- How to engage a community in planning for its town-owned forests;
- How citizens can influence decision-making with respect to the use of town forests;
- Options for how to use town-owned forest resources;
- Challenges in management and use of town-owned forests;
- Strategies and resources for overcoming these challenges;
- Setting community-wide goals for managing town-owned forest resources; and
- Questions and lessons to share with other towns.

Citizen's Handbook: a guide to building community
From the Vancouver Community Network
A guide to organizing for community building projects through citizen action, including getting started, planning and acting, evaluating, getting and keeping people involved, meeting, facilitating, and strategic thinking.

Community Visioning and Strategic Planning Handbook
Derek Okubo. The National Civic League, 2000.
A 62-page guide to developing a vision for your community, including getting the process started, community outreach, defining the current community realities, assessing community capacity, developing a community vision and action planning and implementation.

Engaging Residents in Planning for Municipal Forests: A Case Study of Lincoln, Vermont
National Community Forestry Research Center, 2003.
The story of Lincoln, Vermont demonstrates how a small, rural town can engage its residents in planning for town-owned forests. This study illustrates the steps that can be taken to involve local residents in an effort to determine appropriate priorities for use of town forests. It also shows some of the obstacles a small community needs to overcome in attempting to bring its residents together to discuss municipal forests.

Instigate: An online toolkit for community mobilization
From Transforming Communities
A series of short guides to setting up an action team and mobilizing your community.

Know Your Watershed: A Guide for Watershed Partnerships
Purdue University, Conservation Technology Information Center
A set of guides for planning and organizing around watershed improvement, but useful for community forest projects as well. Topics include:

- Building Local Partnerships
- Leading & Communicating
- Managing Conflict
- Putting Together a Watershed Management Plan

National Park Service Community Toolbox
Guidelines for all aspects of organizing around a community project, including decision making, event planning, meetings, facilitation, communication, organizing, outreach and information gathering. Specific sections include setting goals and priorities, writing press releases, holding workshops and charettes, group mapping and stakeholder analysis.

University of Kansas Community Toolbox
A large and comprehensive resource of free information on essential skills for building healthy communities. Topics covered include community assessment, promoting community interest, strategic planning, leadership development, coalition building, community organizing, and managing financial resources. Troubleshooting guide provides advice and support for overcoming common problems in community planning and action.

Conservation Easements

The Conservation Easement Handbook
Elizabeth Byers and Karin Marchetti Ponte. The Land Trust Alliance and Trust for Public Land, 2005.
Provides technical guidelines for drafting conservation easements-complete with case studies, sample documents and references to landmark court decisions and includes a CD-ROM with sample documents.

Ensuring Sustainable Forestry Through Working Forest Conservation Easements in the Northeast
Robert Perschel. The Forest Guild, 2006.
This report includes a survey of three working forest easements and evaluates how well each easement and its related documents ensures sustainable forestry. These three examples contain a number of key components that can be selectively combined to improve the next wave of easements.

Working Forest Conservation Easements
Brenda Lind. Land Trust Alliance, 2001.
Guide to crafting conservation easements to protect the many values of working forestland, including sample easement language, recommended tools for guiding forest management, approaches for requiring forest management plans, and information on baseline documentation and easement monitoring.

Working Forest Conservation Easements: A Primer for Forest Landowners
University of Maryland Cooperative Extension, 2002.
Provides a short introduction to working forest conservation easements.

Financing Acquisition

Conservation Capital: Sources of Public Funding for Land Conservation
Ann Ingerson. The Wilderness Society, 2004.
A comprehensive guide describing the primary federal programs that fund land and resource conservation in the United States, summarizing both little known federal funding sources and available state and local programs, with a focus on the Eastern U.S.

A Field Guide to Conservation Finance
Story Clark. Island Press, 2007.
A comprehensive book on land conservation financing aimed at local and regional organizations; covers both traditional and cutting-edge financial strategies, outlining tools for raising money, borrowing money, and reducing the cost of transactions; covers transfer fees, voluntary surcharges, seller financing, revolving funds, and Program Related Investments (PRIs).

Conservation Finance Handbook
Kim Hopper and Ernest Cook. Trust for Public Land, 2004.
A guide to generating public financing for local, state and private conservation projects through local, voter-approved conservation finance measures.

Doing Deals: A Guide to Buying Land for Conservation
The Trust for Public Land. Land Trust Alliance, 1995.
A comprehensive guide to buying land for conservation, covering working with landowners and government agencies, surveys, appraisals, and negotiating.

Forest Planning and Management

A Guide to Stewardship Planning for Natural Areas
Ontario Ministry of Natural Resources, 2000.
Step-by-step guide to preparing a forest stewardship plan, including taking a history of the land, preparing a property map, determining stewardship objectives, and taking a detailed inventory. Forms used in the guide are also available online.

Approaches to Ecologically Based Forest Management
John Kotar. USDA Forest Service and University of Minnesota Extension Service.
The publication reviews ecological principles that can be applied to forest management and suggests a method for identifying a range of management alternatives by considering ecological principles, as well as landowners' goals, constraints and opportunities.

A Stewardship Handbook for Family Forest Ownerships
National Association of State Foresters, 2005.
A guide to developing a stewardship plan based on NASF principles for a well-managed forest, and recognizing results of good stewardship on the ground.

Forest*A*Syst: Self-Assessment to Prioritize Your Forest Uses
David Merker, University of Tennessee Department of Forestry, Wildlife and Fisheries.
Written for private forest landowners, this guide provides an overview of natural cycles in the forest, preparing a management plan, principles of timber production, and managing for wildlife, aesthetics and recreation.

Forest Management 101: A Handbook to Forest Management in the North Central Region
USDA Forest Service and the University of Minnesota Department of Forest Resources.
Basic information about forest management separated into six sections: management objectives, socio-economics, ecology, forest health, silviculture, and best management practices. These sections contain information germane to all of the specific tree species guides.

Moving Toward Sustainable Forestry: Strategies for Forest Landowners
James T. Walters and James E. Johnson. Virginia Cooperative Extension, 2000.
Describes management strategies based on eight principles of sustainable forest management, focusing on the owner's role in sustainable forest management, forest management and water quality, enhancing tree growth, protecting special areas, providing wildlife habitat, protecting aesthetic and recreational values, financial incentives for sustainable forest management and enhancing the local economy.

Planning for Forest Stewardship
D. Ramsey Russell, Jr. and Susan Stein. USDA Forest Service, 2002.
A guide to preparing a forest stewardship plan. Though written for participants in the Forest Service's Forest Stewardship Program, which is open to private forest owners, the information, issues and questions it includes provides are useful for management planning for a community forest. It also contains information on some possible sources of funding and technical assistance.

Preparing a Management Plan
Ontario Woodlot Association, 2003.
A short guide outlining the basic steps in preparing a forest management plan.

The Vermont Town Forest Stewardship Guide: A Community Users' Manual for Town Forests
Jad Daley, Northern Forest Alliance, 2008.
This guide highlights "best practices" from town forests across Vermont to help communities maximize the potential of their town forests, from forest management and timber production techniques to strategies for community engagement through forest-based recreation and education. Contains sections on community oversight of town forests, town forest management planning and implementation, forest management considerations, town planning for town forests, engaging your community, and creating a town forest.

Monitoring and Evaluation

Forest Sustainability Indicator Tools for Communities Indicator ToolKit
Sustainable Measures and American Forests, 2003.
An indicator 'tool kit' for forest-based communities that are working on maintaining and enhancing their natural resources as a basis for long-term economic, social and environmental health. A key component of the tool kit is the Montreal Process Criteria and Indicators - a framework, which helps assess ecological, economic and social aspects of forest resources. Although developed to evaluate national progress toward sustainable forests, the framework can be adopted at local level.

Measuring Progress: An Evaluation Guide for Ecosystem and Community-Based Projects
Steven L. Yaffee. Ecosystem Management Initiative, University of Michigan, 2004.
Evaluation Sourcebook: Measures of Progress for Ecosystem and Community-Based Projects
Sheila K. Schueller, Steven L. Yaffee, Stephen J. Higgs, Kathleen Mogelgaard and Elizabeth. A. DeMattia. Ecosystem Management Initiative, University of Michigan, 2006.
Measuring Progress is a comprehensive guide to creating and implementing a monitoring and evaluation plan for natural resource management projects. Focuses not only on monitoring, but incorporating results of monitoring back into ongoing management planning. The Evaluation Sourcebook is a reference to help in selecting indicators for measuring progress on ecological, social and organizational goals, with references to data sources.

Sustainable Forest Management Community Handbook for the Great Lakes Region
Maureen McDonough, Leigh Ann Spence and Wendy Hinrichs Sanders. Great Lakes Forest Alliance, 2002.
A guide with detailed case studies to help communities develop a sustainable forestry initiative, focusing in particular on selecting criteria and indicators of sustainable forest management, and monitoring and evaluating for forest sustainability based on those indicators. Resources listed are for the Great Lakes states, but the principles and guidelines are more broadly applicable.

Organizational Assessment

Marc Smiley Organizational Development has links to training tools on several topics related to organizational development, including assessment, board development, staff management, organizational structure, strategic planning and fundraising.

La Piana Associates has a due diligence tool developed to help grantmakers assess potential grantees. It is available to download at no cost from their publications page after free registration.

Timber Management

A Landowner's Guide to Selling Standing Timber
Ontario Woodlot Association, 2001.
A detailed handbook on preparing for a timber harvest, including sections on the basics of selling timber, long-term management, determining whether to hire a professional forest consultant, preparing for harvest, harvest operations, and legal considerations. References to legal, contract, tax and workplace safety regulations are specific to Canada.

Choosing a Silviculture System
Ontario Landowner Resource Center, 1999.
A short guide explaining three silviculture systems - how they work, results, where they work best, and benefits and disadvantages.

Wood Energy

Harnessing the Power of Local Wood Energy: Ensuring a sustainable supply of woodchips for your school
Caitlin Cusack. The Forest Guild, 2008.
A case study of the installation of a woodchip heating system at school in Bristol, Vermont, providing a framework that other communities can use to develop a standard for sourcing SELF woodchips. While the guide is specifically geared toward ensuring a sustainable supply of woodchips for schools, it is also applicable to other community buildings.

Wood Chip Heating Systems: A Guide for Institutional and Commercial Biomass Installations
Timothy M. Maker. Biomass Energy Resource Center, 2004.
A detailed, step-by-step guide to wood chip heating systems, from investigating the feasibility of burning wood chips to studying its cost-effectiveness, and finally installing an appropriate biomass system. This goes from providing an overview of wood chip heating systems and appropriate settings for their application to detailed technical specifications for installation.

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Acquiring and Managing a Community-Owned Forest: A Manual for Communities

Evaluation Form

Please take a moment to fill out and return this form. Your feedback will help us improve future versions of this manual, as well as our other services and programs. Thank you!

My community is currently involved in a community-owned forest project. ○ Yes ○ No

If yes, where are you in the process?

This manual was useful for our community forest effort. ○ Agree strongly ○ Agree ○ Disagree

Please explain.

I got the information I needed from this manual. ○ Agree strongly ○ Agree ○ Disagree

The manual addressed appropriate topics. ○ Agree strongly ○ Agree ○ Disagree

If not, what additional information or topics would have been helpful?

The manual was clear and well-organized. ○ Agree strongly ○ Agree ○ Disagree

The case highlights were helpful. ○ Agree strongly ○ Agree ○ Disagree

What part(s) of the manual were most helpful? (You may choose more than one.)

☐ Getting started ☐ Engaging the broader community ☐ Acquiring the land
☐ Long-term management and stewardship ☐ Topical resources

What additional assistance can the Communities Committee provide for your project?

How did you find out about or receive this manual?

○ Email list (please specify) ○ Website (please specify) ○ Individual email ○ Other (please specify)

If you know of any other organization or individual who could benefit from this manual, please list them here.

Submit form by email