

### What is the Forestland Transfer Program?

Since 2016, the Farm and Forest Viability Program has been working with community partners to provide in-depth forestland ownership transfer planning for forestland owners in Vermont. According to the Vermont Department of Forests, Parks and Recreation, more than 80% of Vermont forestland is owned by families and individuals, and 65% of forest landowners are over the age of 55. Without adequate transfer planning, family land is much more likely to be sold, subdivided, and developed. The Forestland Transfer Program aims to prevent forest fragmentation by guiding landowners through planning that keeps forests intact and undeveloped with intergenerational transfer, transfer or sale to new owners, or permanent conservation easements. Enrolled landowners receive technical support in the development of a transfer plan that can later be used in the development of a formal estate plan with a legal professional. Other services supported by the Forestland Transfer Program include workshops, classes, and educational materials produced and offered by our organizational partners.

### Why is Forestland Protection Important?

Forests provide numerous benefits to Vermonters: clean air, clean water, flood resiliency, biological diversity, wildlife habitat, maple products, a renewable resource for heating fuel, building materials, & wood pulp, as well as a stage for our outdoor recreation and tourism industries. Larger, more interconnected forests can more readily provide these benefits, while smaller, more fragmented forests are less capable of providing them. The increasing fragmentation of Vermont's forests is both an ecological and economic concern. Vermonters and Vermont's conservation community place a high priority on forest protection as the climate, economy, and ecology of Vermont face new challenges.

### Who is the programming for?

Guidelines for landowner eligibility are intended to support the program's goal of keeping forestland intact. To be eligible for the in-depth forestland succession planning advising services offered by the Viability Program, forest landowners must:

- ✓ Own forestland at least 50 acres in size *or* that demonstrates significant or unique community or ecological assets. Vermont residency is NOT a requirement for eligibility.\*
- ✓ Be willing to commit significant time to the planning process, and must be committed to fully participating within the program model. Find more information in the [Transfer Planning Guidelines](#).
- ✓ Have goals for Forestland Transfer that align with the program's intention of keeping forestland intact.

### How much does it cost for me to enroll?

There is a \$75 fee to enroll in the Vermont Farm & Forest Viability Program. We will reimburse your enrollment fee if we are unable to enroll you. All planning services and limited specialist consultation are covered once enrolled.



### **What happens after I apply?**

If you have not already received a call, you will be contacted by the Forest Program Specialist to set-up an enrollment call where we will review the program, you will share with us what type of assistance you are seeking, and we will evaluate if your property is eligible and your needs and goals are a good fit for our program. Once you officially enroll in the program, you will be matched with an advisor and will begin work with them directly. If enrollment is not a fit, we will share referrals to other relevant resources or programs.

### **What will I get out of the program?**

Participating landowners are matched with a lead advisor(s), who serves as a guide through the transfer planning process. Landowners will receive 20-100 hours of coaching/support. The lead advisor will:

- ✓ Provide information & guidance on transferring ownership of forestland, with particular focus on the legal, financial & family dynamic involved
- ✓ Clarify options for families
- ✓ Convene meetings
- ✓ Act as a neutral party to family discussions
- ✓ Facilitate organization of relevant legal and technical documents and information
- ✓ Connect families with subject-area specialists, prepare them for taking best advantage of those services, and organize/facilitate specialist meetings if necessary
- ✓ Encourage forward movement of the transfer planning process

Clients will develop a complete transfer plan to utilize in the development and implementation of their estate plan. The final transfer plan is a tool to educate and prepare landowners for next steps with legal professionals. It is not a legally binding document.

### **Will you write a transfer plan for me?**

Our program is designed to support landowners in the development of their long-term forest ownership and stewardship planning. Many of our advisors are working simultaneously with a number of different landowners. Because of this, we do not write transfer plans, rather we work with the landowner in a structured format to put the plan together as a collaborative effort.

### **How long is the program?**

Farm & Forest Viability enrollment may be from 6-24 months, depending on the type of plan and level of need.

### **Who will I work with?**

Once enrolled, landowners/families will work with a Forestland Transfer Advisor through one of our partner organizations. For those applying through our open enrollment, our staff will work with enrolled landowners to match them with an appropriate advisor for their land and ownership needs. Those entering the program with an existing Viability Program advisor may choose to retain that advisor. Landowners and planning advisors then meet and work together for one to two years to compile documents and produce a written transfer plan. Advisors are available for 20-100 hours per client. At the present time, contracting organizations include: **Environmental Mediation Center; Redstart Natural Resource Management; RJ Turner Co.; Vermont Coverts: Woodlands for Wildlife; Vermont Natural Resources Council; and Vermont Woodlands Association.**

### **What is expected of me in this program?**

We ask individuals and families who enroll to commit time and energy to the program, which includes attending meetings, responding to advisors punctually, letting advisors know in advance if you need to cancel a meeting, and getting back to your advisor with information in a timely way as requested. Clients enrolled in the Transfer Planning Program are expected to complete a Transfer Plan with the support of their advisor.

### **If I need help facilitating family discussions who can help?**

Your advisor may be able to help facilitate discussions with your family or co-owners, however, professional mediation may be the best option depending on your specific circumstances. Professional mediators are a part of advisor cohort and may be available as needed.

### **What if I don't think my advisor is a good match?**

If for any reason you do not find that your advisor is the right match for your situation, please contact us directly and we will work to find a new advisor or suggest alternative resources.

### **What if I get started and decide the program is not for me?**

We understand that long-term planning takes a lot of time and energy, family dynamics can be challenging to overcome, variables change, or our program might not be the right fit. If you would like to end your enrollment, please let your transfer advisor or the VHCBC program specialist know as soon as possible so that we may open that spot up to a new landowner.

### **If I have been in the program before, can I re-enroll?**

In some cases you may be eligible to re-enroll depending on overall demand and capacity of our advisors. We prioritize new enrollments to share resources equitably among landowners, but if we have the capacity we are happy to consider a landowner or family for re-enrollment or post-program support.



### **What if I need to start planning but I am not ready for in-depth transfer planning?**

For introductory information on transfer planning, landowners may choose to participate in workshops, classes or events hosted by one of our organizational partners. A range of forestland transfer-focused educational opportunities will be available through [Vermont Coverts](#), [Vermont Woodlands Association](#), [Vermont Natural Resources Council](#), and their partners across Vermont. Visit their websites or reach out to VCHB program staff for more information.

### **Will my personal and financial information be kept confidential?**

As an organization receiving public funds, we are required to share the name and location of clients that receive our services. All other individual information is confidential. Staff may reach out for permission to develop a story about your experience, but this is not required. A copy of our confidentiality policy is below:

*VHCB, as a public instrumentality, is subject to the Vermont Public Records Law, 1 VSA § 315. The information submitted by participants and service providers to VHCB will be held in confidential files at VHCB and will not be available for public inspection under the Public Records Law. VHCB considers the following information about participants to be subject to public record: names of participants that have applied to or are enrolled in the program; their town of residence; type of farm or forest; and the purpose and amount of any implementation grant or technical assistance award applied for or received. Planners and technical assistance providers must agree to keep transfer plans confidential to protect clients' interests, but must agree to furnish copies of completed plans to VHCB Staff. Staff or contractors who are approved for viewing transfer plans will not be allowed to make copies, or to share information from the plans with any other person.*

*Note: The Vermont Housing & Conservation Board is an equal opportunity provider and employer.*