

NB Private Woodlot Owner Organizational Design Proposal

Purpose and Context:

The purpose of this document is to propose a single, comprehensive, province-wide organization to help woodlot owners fulfill their individual and collective needs in effective and efficient ways while also meeting the applicable needs of the NB government.

There is a sense by many in government, the forest industry and even amongst woodlot owners that woodlots are not meeting their potential. At the same time, woodlot owners are dissatisfied with the current state of resources, services, policies, and constraints available to or placed upon them. One question being asked, is 'how can these challenges be resolved'. While relevant, this document does not directly address that question. It does not identify the problems or challenges faced by woodlot owners or propose fixes.

Instead, it takes a different approach to resolving the current and on-going problems. It proposes an organizational structure that fulfills woodlot owners' desires and needs individually and collectively, irrespective of the current situation. It identifies what woodlot owners want and need, what government wants and needs, and proposes an organizational structure to meet those desires and needs. The aim of this document is to envision the ideal organizational structure needed to help woodlot owners succeed. Once the best organizational structure is determined, what needs to be done to resolve the problems can meaningfully proceed.

The proposed structure is not a radical departure from what currently exists. In fact, some of the components of the proposed organizational structure exists in some form today. In addition, the concepts described in the proposed structure have been discussed by Marketing Boards, the NB Federation of Woodlot Owners and others. As such, the proposed structure represents evolution rather than revolution. The proposed description is partly an articulation of what has already been considered.

One reason development of proposed structure has not proceeded is because hurdles to realize it seem insurmountable. There has been a sense that the problems facing woodlot management need to be determined before a structure to resolve them can be developed. In this document we take a different approach. We envision the ideal structure first, based on what woodlot owners need and desire, then we will determine how to bring it to fruition.

As you read about the proposed organizational structure, try to set-aside your personal preferences and biases. Try to set-aside territorial and political allegiances. Set-aside what is currently done. Try to set-aside the things that might prevent the proposed structure from being realized or what needs to be done to realize it. These things are all important, but they are secondary. They are the things that need to be considered and addressed after the vision has been articulated and agreed upon.

The proposed organizational vision is a goal and it won't be fully realized overnight. It will take time for all the elements being proposed to come to fruition. After the proposed organizational structure is discussed, analyzed, revised and eventually accepted, transitioning from the current situation to the one envisioned will include:

1. Conducting a critical review of the current situation to identify constraints and opportunities for transitioning to the proposed vision.
2. Developing a transition plan to evolve from what currently exists to the proposed organization.
3. Implementing the transition plan

To the extent possible, the language and words used in the proposed organizational structure are generic. The aim is to be objective and descriptive and to avoid confusion with what currently exists. Precise and informative words and language that reflect organization's persona will need to be determined once the concepts have been meaningfully described and accepted.

So, what is best organizational structure serve all of NB's private woodlot owners, individually and collectively. What organizational structure best fulfills their needs and desires? What does this organizational structure look like and do? This document describes that vision.

Road Map

The document:

1. Gives the overarching goals the organization needs to fulfill
2. Lists and briefly describes the individual and collective needs of private woodlot owners and the NB government. These can be considered as the objectives the organization needs to fulfill.
3. Describes the proposed structure to fulfill the goals and needs

Overall Goals

There are 3 overarching goals of an ideal NB private woodlot owner organization:

1. Be effective
 - a. Fulfill individual and collective woodlot owner needs and desires.
 - b. Fulfill NB government goals and desires for NB's private woodlot owners, their woodlots, and the services available to support them
2. Be efficient
3. Raise the persona of forestry across the province by doing high level, state-of-the art forestry, being visible, and being highly trustworthy.

Woodlot Owner and NB Government Needs

Table 1 lists the needs owners have to effectively manage their woodlot. Some of the needs are individual and some collective. The purpose of the table is to:

- Identify and clarify the nature and scope of needs
- Use the needs as the basis for determining an organizational design that best fulfills them

Table 1. Summary of Private Woodlot Owner Needs, Cost and Funding Sources

Individual Needs
<p>Woodlot Management Plan</p> <ul style="list-style-type: none"> - Identifies and addresses all woodlot owner goals. Goals include but are not limited to timber production. They can be related to wildlife, water, recreation, carbon, conservation, lesser vegetation, climate change resilience etc. - Plans that are integrative and address multiple goals concurrently
<p>Plan Implementation</p> <ul style="list-style-type: none"> - Identifying who does the work described in the plan, - Supervising the work to ensure it is done on time in a quality way, - Ensuring everyone is satisfied and paid.
<p>Monitoring</p> <ul style="list-style-type: none"> - As specified in each plan - Includes both short and long-term inspection to determine whether stand development is proceeding as planned
<p>Boundary</p> <ul style="list-style-type: none"> - ID - Maintenance
<p>Marketing</p> <ul style="list-style-type: none"> - Affirm market availability - Ensure product delivery <ul style="list-style-type: none"> o Transportation certificate is in place for wood for example
<p>Financial Account Administration</p> <ul style="list-style-type: none"> - Determine how to best distribute income (lump sum vs distributed over time)
<p>Knowledge</p> <ul style="list-style-type: none"> - Learning about woodlot management and other forestry topics - Being aware of issues facing woodlot owners
<p>Community</p> <ul style="list-style-type: none"> -
<p>??</p>
<p style="text-align: center;">Collective Needs</p>
<p>Advocacy</p> <ul style="list-style-type: none"> - Having common interests and needs addressed
<p>Communication</p>
<p>Government Relations</p>

Finding Funding to Fulfil Needs
Administration, Organizational Coordination and Mgmt for effective and efficient service to for all woodlot owners
Specialized Technical Services as Needed
- GIS, mapping, remote sensing
- Forest Inventory management
- Planning
- Wildlife
- Water/Wetlands
- Plants
- Financial – <ul style="list-style-type: none"> o Marketing <ul style="list-style-type: none"> ▪ Identify markets (timber, NTFP, Carbon, Biodiversity) ▪ Negotiating prices o Taxation o Economics
- Climate change resilience
- Carbon sequestration
- Biodiversity
- Engineering (roads, structures)
- Species at risk
- NTFP
Knowledge <ul style="list-style-type: none"> - Credible and timely knowledge and information - ?
NB Government Needs
Forest Products and Services <ul style="list-style-type: none"> - Timber for wood supply - Conservation/preserved area for natural biodiversity
Effective Forest Management
Efficient and Accountable Resource Distribution
Consistent Service to all WOs

Landscape Management
Rule and Regulation Enforcement

Organizational Structure

The proposed organizational structure is illustrated in Figure 1. It is a single, comprehensive organization designed to help woodlot owners meet all their needs and desires. NB’s 42,000 woodlot owners are the top of the organization. They are the ‘owners’. The organization’s main purpose is to serve them. A Board of Directors comprised of woodlot owners provides strategic and policy related direction through their general and functional expertise. The province is divided into 7 geographic Forestry Districts (similar to what currently exists with Marketing Boards) and each of these works directly with individual woodlot owners to fulfill their needs. The Provincial Office & Forestry Team provides NB-wide services to fulfill woodlot owners’ collective needs as well as coordinate the districts to enhance consistency, efficiency and effectiveness among them. The Provincial Office interacts with government and provides overall administrative service and leadership to the organization.

For the time being, the organization is called ‘The NB Private Woodlot Forestry Service’.

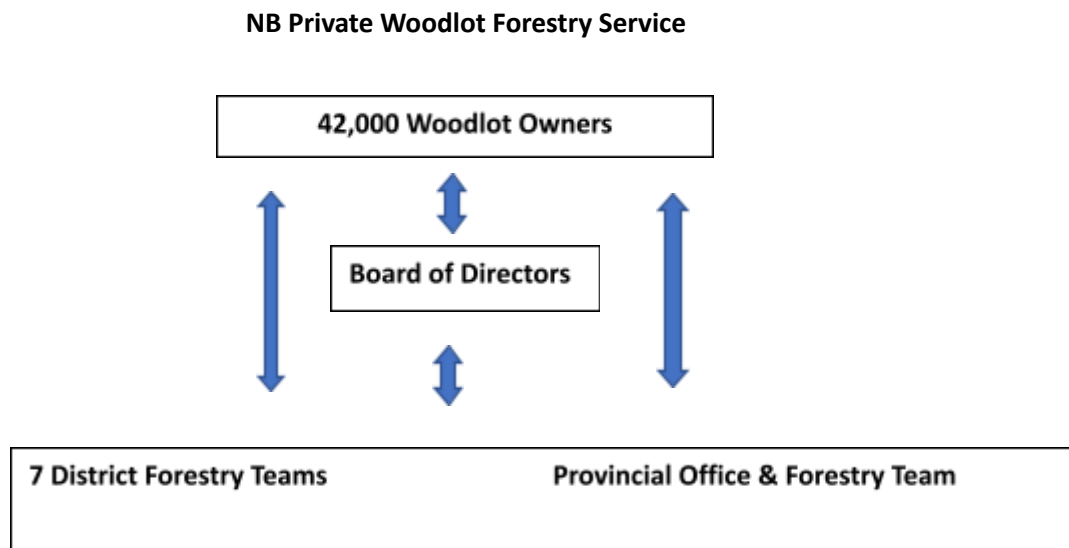


Figure 1. Proposed Private Woodlot Forestry Service Organizational Structure

The following describes each of its components. The aim is to provide sufficient detail to be informative without being excessive. Additional detail will be added once the concepts are discussed and determined.

42,000 Woodlot owners

1.9 million hectares or 30% of NB's forest land is owned by 42,000 private woodlot owners. Their woodlots range in size from 10 to 100+ ha with about 60% less than 30 ha in size. They are mostly found near the province's borders and along its major streams, rivers, and transportation networks. In short, they are highly accessible. Collectively and individually, private woodlots are highly variable. They are comprised of a variety of forest types and conditions. The owners are highly varied as well. They have a variety of values and interests and they use their forested land for a variety of purposes. Some live on their woodlot and many don't. Woodlot owners represent both linguistic communities and demographically they mirror NB's population. In keeping with this pattern, their main source of income is the variety of types of work that occur across society. It is not derived from their woodlot. They produce a variety of products from their woodlots though, and at best, the sale of these supplements their income at irregular intervals. Collectively, in 2022, woodlots contributed about \$59 million to NB's economy.

Overall, private woodlots comprise a substantial part of NB's forested land. They and their owners are highly variable and while dispersed across the province, private woodlots are accessible and occupy some of NB's more productive land. Collectively, they have large impact on the environment and economy. However, there is a sense that the potential of woodlots is not being fully realized because woodlot owners are not sufficiently knowledgeable and resources available to them are dispersed, insufficient, or not serving their best interests.

Board of Directors

The proposed Board of Directors would provide oversight and guidance to the Private Woodlot Forestry Service on behalf of NB's 42,000 woodlot owners. In addition to being a 'steering' committee, the Board 'rows'. It innovates, pushes, pulls, and does, in addition to providing advice.

Nature and Scope:

Service on the Board and the process for selecting Board members is summarized below. A detailed description of Board composition and determination will be given in detail in a separate document.

- Composition
 - o The Board will be comprised of 7 people
 - o Board members will have 4 important attributes.
 - They are woodlot owners who provide woodlot owner perspectives and put woodlot owner needs and desires first and foremost.
 - They can 'see' the big picture and are integrative

- They provide a needed specific functional service.
 - Functional service essentially means that each Board Member provides ‘expertise’ in a specific area needed by the organization to ensure on-going success such as helping secure funding, influencing others, providing legal advice, providing forest management and scientific technical knowledge, etc.
- They represent all woodlot owners, not simply themselves or their region/district.
 - Board membership will be staggered to ensure continuity
- Identification
 - Board members can be proposed by woodlot owners or employees of the NB Private Woodlot Forestry Service. They can also self-identify.
- Affirmation
 - Board Members will be determined by vote at an AGM
- Service
 - 4 years
 - Required to ‘step-down’ at the end of a term
 - Can serve several successive terms but must be reinstated through the normal selection process

Roles and Responsibilities:

Board members assume the following roles and responsibilities. They:

- Represent the entirety of NB private woodlot owners.
 - They don’t simply represent themselves or their district. They represent all woodlot owners across NB.
 - They learn about woodlot owner needs and desires through proactive listening
- Provide Strategic Direction.
 - They provide direction on what the organization should achieve in the medium and distant future and how to achieve those aims.
- Provide functional guidance needed to fulfill strategic direction.
 - Each Board member needs to fulfill a specific functional role that contributes to the organization’s success. As a functional expert, they provide support and guidance in their area of expertise.
- Ensure meaningful policies are developed and followed.
- Ensure the organization’s financial ‘health’ and success.
- Monitor the organization’s status and progress toward fulfilling its vision and strategic goals.

District Forestry Teams (DFT)

Nature and scope:

The Province will be divided into 7 geographic districts (using the current Marketing Board boundaries).

Each district will have:

- A district manager who might also lead one of the districts forestry teams
- Approximately up to 15 forestry teams each consisting of a:
 - o Registered professional forester (RPF)
 - o One or more registered professional forestry technicians (CFT)
 - o 1-2 part time student interns.

Each team will have approximately 400 woodlot owners on its 'client list' or about 40,000 ha under its guidance. Only a about 50% or 200 of these woodlot owners and 20,000 ha is expected to be under active management at any point in time.

- One or more administrators will support each district and its teams.
 - o The administrator(s) will provide front-line financial, HR, and computer coordination and support. They will be an extension of the provincial office utilizing provincial office resources and fulfilling provincial office needs to ensure consistency and efficiency. However, they also provide personal support to DFT members, teams, contractors and woodlot owners to ensure effectiveness.
- One forest extension specialist
 - o A forest extension specialist will develop and coordinate forest education activities for each district's woodlot owners and staff. They will learn about woodlot owner educational needs and desires, identify meaningful ways to fulfill them, and facilitate implementation. They will use mass, group and individual methods.
 - o They will be an extension of the provincial office, utilizing its resources and supporting coordinated activity across the province to ensure consistency, effectiveness and efficiency.
- Physical office space
 - o Space is needed to store equipment and supplies, house non-mobile computer equipment like printers, and be place where teams can write management plans, interact, and as needed, meet with woodlot owners and contractors.

Roles and responsibilities:

Members of the 105 forestry teams across the province will be Registered Professional Forester or Certified Forest Technicians. They will be generalists_who do private woodlot management in collaboration with owners. They will:

Develop management plans with owners:

- Plans will fulfill woodlot owner values, goals and may include NTFP, wildlife, water, carbon, conservation etc.. as well as timber management objectives.
- The aim is to integrate objectives in meaning ways. Timber management for example is not exclusive or independent of other values and goals.

Implement plans on behalf of owners:

- DFTs will implement plans to the extent desired by the woodlot owner by identifying and securing contractors, and supervising operations to ensure complete high-quality work.

Do landscape management:

To the extent possible, DFTs will:

- Develop landscape management plans across neighboring woodlots to simultaneously fulfill joint goals. Some wildlife habitat, conservation, and riparian zone management goals are best fulfilled at the landscape level and DFT teams will coordinate across woodlot owners as much as possible to address these.
- As much as possible, implementation activities will be conducted across neighboring and proximate woodlots to achieve operational efficiency in harvesting, planting, infrastructure creation etc.

Monitor woodlot evolution relative to plans:

- As specified in the management plan, woodlots will be monitored and plans will be updated to reflect changing conditions.

Distribute 'Private Woodlot Sustainability and Silviculture Funding' Effectively and Efficiently:

- DFTs will utilize/distribute funding to fulfill woodlot management plans

Be knowledge providers and seekers:

- DFTs will provide forest science and forest management knowledge to individual woodlot owners as they work with them. In addition, they will identify forest extension needs that can be best developed and provided by the forest extension specialist in their district.
- Every person in all DFTs will be a life-long learner enhancing their own knowledge, skills, and attitudes.

Call on, use, and support Provincial Office resources, administrators, and forestry teams:

- DFTs will use the provincial forestry team to help meet their needs. When an individual woodlot owner's needs require a specialist to help address unique or difficult challenges or opportunities, DFTs will reach-out to a Provincial specialist. For example, wildlife management, riparian zone management, building a bridge or road, conserving land, and financial management to name a few may require a specialist working with the DTF and woodlot owner.
- Markets will be developed and managed by a provincial specialist and DFTs will utilize those markets. They will also tell Provincial marketing specialists about opportunities and needs.

Provincial Office and Forestry Team (PFT)

The Provincial Office and Forestry Team both follows and leads the DFTs as well as providing province-wide support to woodlot owners as a whole. As a follower, it responds to the DFTs by providing technical specialists as needed, doing administration (payroll, benefits management, ???), supporting

computer technology needs, etc. In effect it works for the DFTs to help them be effective and efficient. As a leader, the PFT provides coordination across the DFTs to ensure consistency, efficiency and enhanced effectiveness. The PFT also supports all woodlot owners by identifying funding sources, influencing politicians and other stakeholders, and coordinating forest extension activity. It creates district-wide and provincial-wide forest management plans and reports on collective management effort. In short, it provides economies of scale to minimize costs and to provide overall effectiveness and consistency. The following list gives and briefly describes the main functions of the Provincial Office and Forestry Team.

Overall Leadership

A leadership team needs to be determined. A typical one might include a general manager and as described above, there might be a manager for each district and one for the provincial office.

Chief Forester

The chief forester works across all DFTs extending/sharing knowledge across them, ensuring consistent standards and practices, supporting individual DFT needs, and stimulating innovation.

Technical Specialists

Technical specialists help DFTs fulfill specialized woodlot owner needs. No district team needs its own suite of specialists to support their forest science and forest management technical needs. There simply isn't enough demand within any one DFT. However, across the entire province where collective demand exists, specialists will be on-call as needed.

Specialists might provide expertise in such things as wildlife, water, forest engineering, climate adaptation, GIS and e-technology, data base management, NTFP (eg. maple syrup, fungi, x-mas trees etc.), and lesser vegetation management to name several.

They will also seek and report-on research in their specialty to help the DFTs be innovative and enhance continuous learning across woodlot owners and the organization.

A forest management specialist will develop district and province wide management plans that both amalgamate woodlot management plans and provide strategic direction for all woodlots as a whole.

When no specialist exists within the organization, the Provincial Office will reach out to partners who provide the needed services. For example, if a woodlot owner wants to conserve all or part of their woodlot, the Provincial Office would connect them to a partner conservation organization.

Forest Products Marketing/Sales

The aim of this part of the organization is to:

- Identify markets for all forest products in all districts
- Negotiate prices
- Work with DFTs to identify specific markets, facilitate efficient sales, and support delivery and record keeping etc

Administrative Management

Too provide economies of scale and consistency across the organization, administrative and computer support services will mostly be centralized. The aim is to be highly efficient by providing and coordinating HR services like payroll and benefits as well as common business services like accounts receivable, accounts payable, account record keeping etc. As described early, district administrators will be the go-to, front-line people in each district who utilize central's administrative services and apply them at the individual and district level.

One service woodlot owners' may find useful is woodlot financial management. In addition to giving financial goals and predictions in woodlot management plans, maintaining woodlot inventory and financial records, and as applicable, distributing proceeds from the sale of wood products, woodlot owners might find it beneficial to have a trust administered through the organization that distributes income from the sale of forest products over time rather than as a lump sum payment.

Advocacy, Networking, Project Identification and Management, and Government Relations

To avoid a divide and conquer situation, woodlot owners need to speak with one unified voice when interacting with industry, government, and other organizations to the extent possible. Advocacy is partly about determining the common needs and desires of NB's 42,000 woodlot owners. It is partly about projecting that voice on behalf of woodlot owners, and it is partly about rallying woodlot owners to use their voice in individual ways to advance collective needs.

Success occurs where opportunity meets preparedness. Networking is central to identifying opportunities. While advocacy might indirectly encourage others to identify opportunity, networking proactively seeks it out. Networking also identifies threats to woodlot owners so they can be addressed before they become problems.

The organization won't succeed without external funding. Much of this will come from identifying external sources, proposing projects and administering them. Canada's 2 Billion Trees Program is an example of a project that simultaneously helps fulfill both organizational and woodlot owner needs. Identifying carbon credit projects might be another example of project identification and administration that can occur through the PFT.

The Provincial Government supplies a portion of the funding used to support woodlot owners. The Private Woodlot Silviculture Fund and the newly developed Private Woodlot Sustainability Fund are 2 examples. The government would like a single administrator of these funds and that would occur through the Provincial Office. In addition to administering existing funds, the Provincial Office would identify and propose new NB government initiatives.

Communication

Given the nature and scope of NB private woodlot ownership, effective communication will be vital to creating a sense of community, provide objective forestry information, and do advocacy. It requires the organization listen to the needs and desires of NB's 42,000 woodlot owners as well as speak on their behalf.

A significant portion of the organization's communication effort will occur when DFT's interact with individual woodlot owners and when woodlot owners interact with each other. A large portion also needs to occur between the organization and woodlot owners as a whole, external stakeholders, and the public at large. As well, internal communication is vital to having an informed and positive workforce.

Messaging needs to be consistent, convey the desired image, and be emotive as well as technically informative. It needs to be up-to-date. Provision of historic information or said another way, a library service may be needed to ensure technical and other information required for effective woodlot management and continuous learning is easily available.

In short, communication, including information acquisition, message development, distribution and storage are needed and will require a significant effort.

Forest Extension Service to Woodlot Owners and Continuing Education to All People in the Organization.

To ensure on-going, state-of-the-art, effective private woodlot management across the province, woodlot owners and everyone working for the organization need to have high level knowledge and skill.

As described under the DFT section, most of the forest extension and continuous learning activity will occur in the DFTs. However, it will also be coordinated through the Provincial Office to ensure consistency, idea sharing, and do those things best done at a provincial scale. For example, connecting with and using knowledge providers at colleges, universities, governments, research organizations like the Canadian Forestry Service and the NB Northern Hardwood Research Center, and specialists working with ENGOs.

One unique educational aspect the Provincial Forest Extension specialist will be to develop and coordinate internships. These are mostly with college and university students who want a work experience as part of their formal education. Interns will be placed across the organization to support the organization's work. However, internships will also be a learning experience for students and need to embody all the dimensions of experiential learning. These will be managed by the provincial specialist.