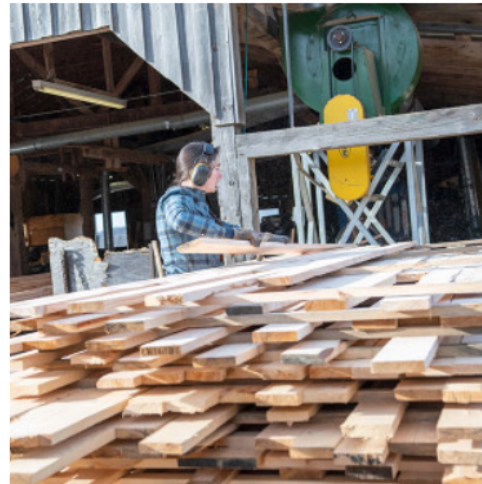Vermont Forest Future

Advisory Panel Meeting

January 4 2023

Vermont Forest Future
Strategic Roadmap Development

Review timeline

STEP 1
Explore Perceptions

STEP 2
Future Scenarios and Implications

STEP 3
Develop Draft Strategic Roadmap

STEP 4
Forest Future Strategic Roadmap

- Review research
- Industry Roundtables
- Stakeholder Survey #1
- Interviews

- Future Think Tanks
- Vision workshops
- Stakeholder survey #2
- Identify Preferred Future

- Build strategic framework
- Identify key themes
- Focus Groups
- Draft Recommendations

- Future Summits

Current Conditions Report

Scenarios of the Future Report

Draft Recommendations Report

Final Roadmap Report

November – January

December - March

March – May

June - November

Vermont Forest Future – Q1 2023 Work Program

**January 2023 work program
(Explore Perceptions)**

- Stakeholder Survey #1 (closes Jan 31)
- Government agency interviews
- Key stakeholder groups / associations interviews
- Portal updates (on-going)
- Think Tank - Part 2 (Jan 31, 2023) – plausible futures
- Current Conditions Report
    - Industry Round tables
    - Stakeholder interviews and survey
    - Key drivers' analysis
    - Background research review

**Feb - Mar 2023 work program
(Future Scenarios and Implications)**

- Draft Think Tank report produced (Feb)
- Public engagement workshops (vision workshops – 13-16 March)
- Stakeholder Survey #2 (March)
- Identify Preferred Future (and expected and least desired) (March)
- Final Think Tank report produced (March)
- Identify strategic pillars
- Begin forming focus groups (FG sessions week 10 April)

January 2023

Feb - Mar 2023

Stakeholder Survey #1
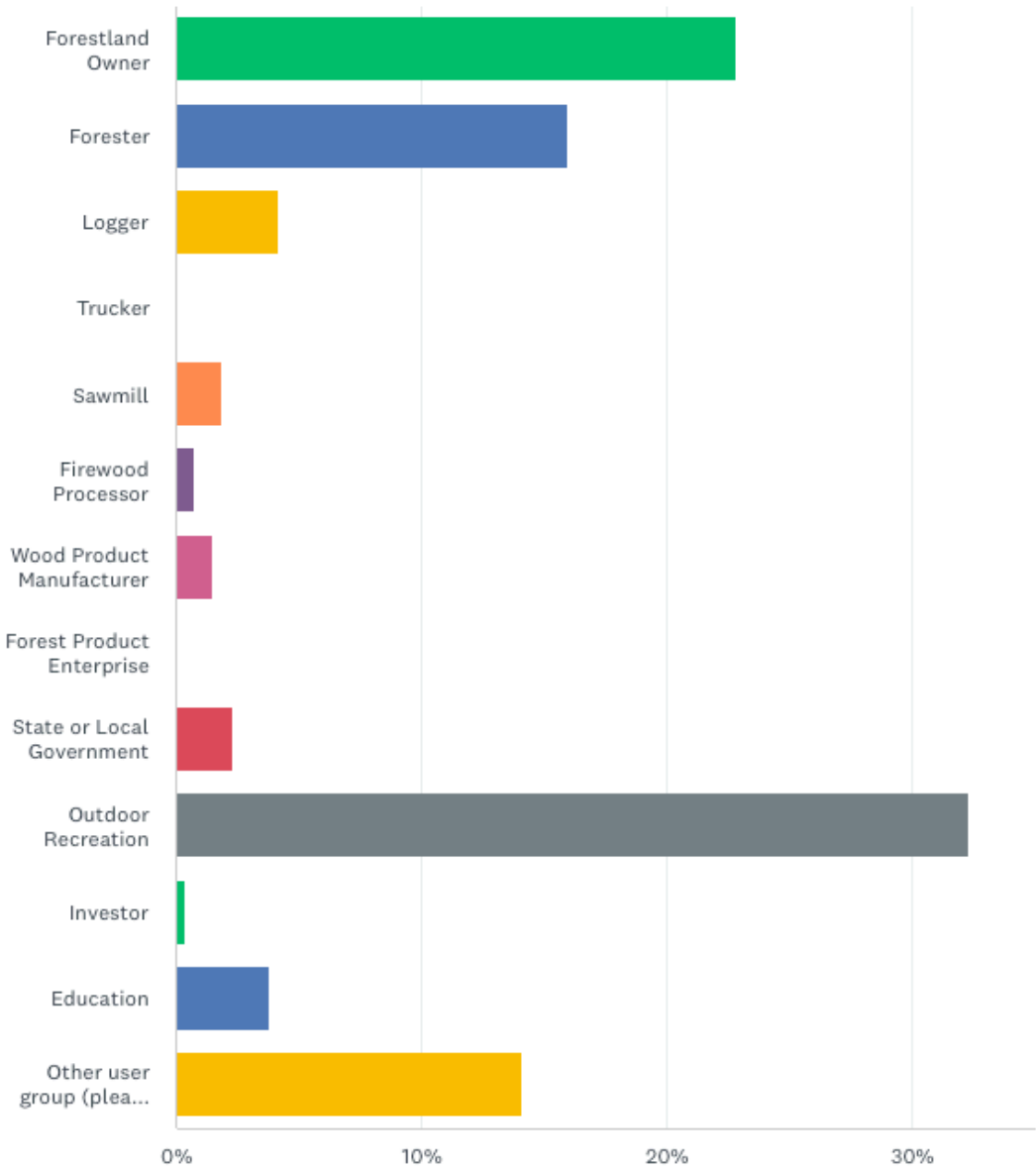
N = 236
21 questions
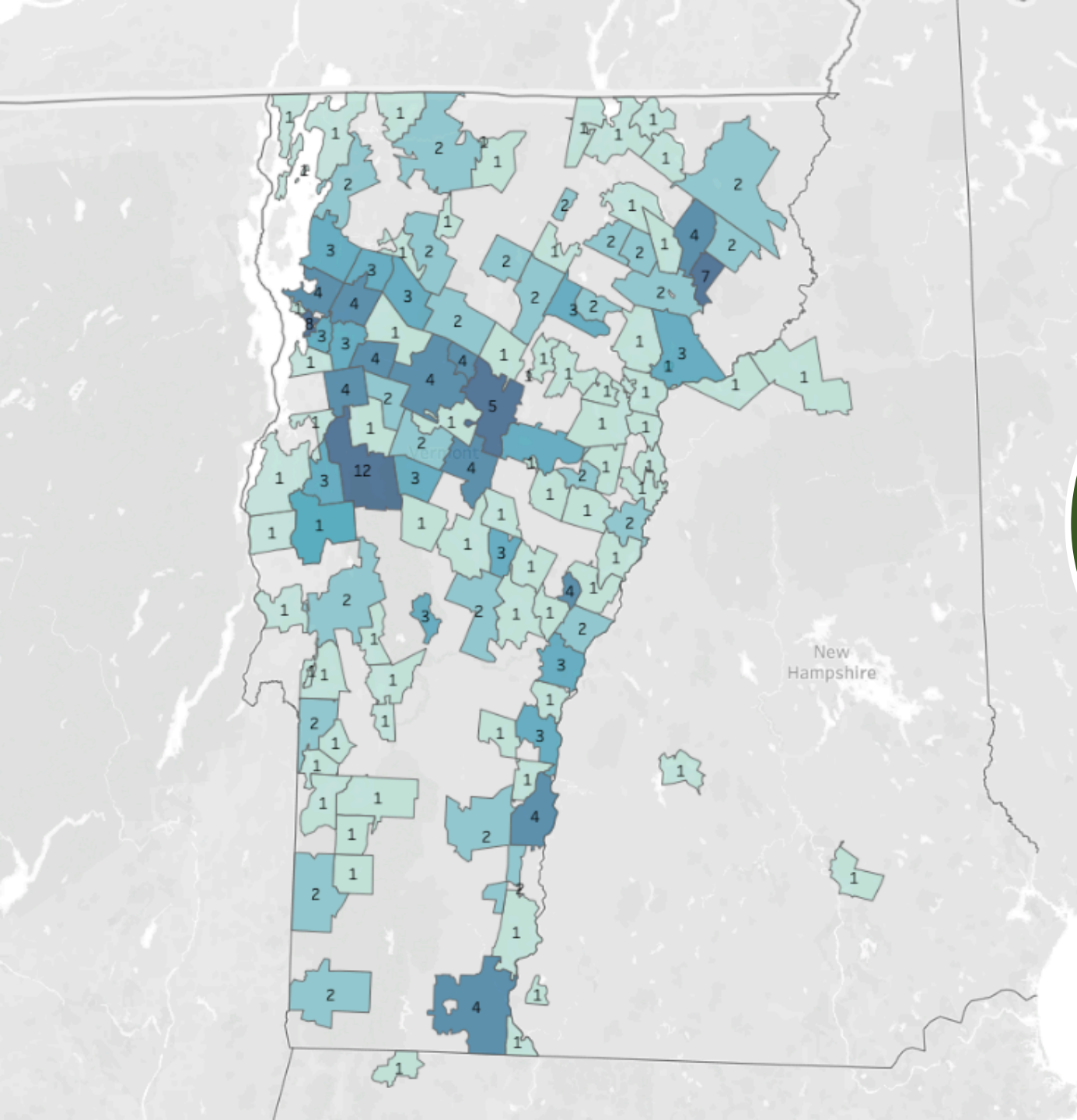69% completion
Average 22 minutes spent

What user group best describes your primary association with the Vermont forest economy? (select one)
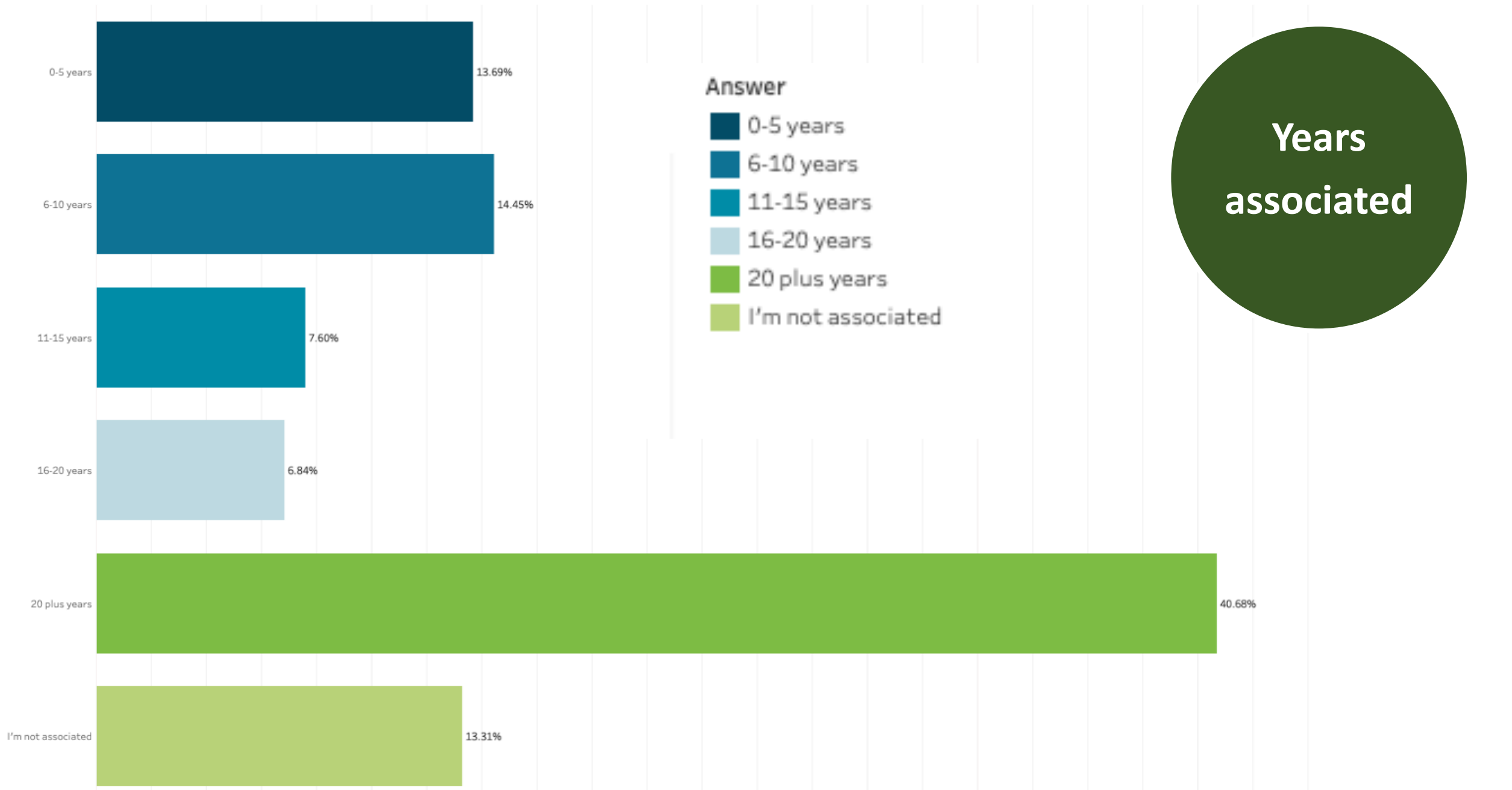
Answered: 263   Skipped: 0

Primary Association

Zip code

VERMONT FOREST FUTURE
STRATEGIC ROADMAP

How long have you been associated with the Vermont forest products sector?

Answer	
0-5 years	13.69%
6-10 years	14.45%
11-15 years	7.60%
16-20 years	6.84%
20 plus years	40.68%
I'm not associated	13.31%

Years associated

What is your age group?

Age group	Percentage
19-29 years	3.04%
30-39 years	15.59%
40-49 years	17.49%
50-59 years	19.01%
60-69 years	26.24%
70-79	14.45%
80 years and over	3.80%

Answer
- 19-29 years
- 30-39 years
- 40-49 years
- 50-59 years
- 60-69 years
- 70-79
- 80 years and over

Age group
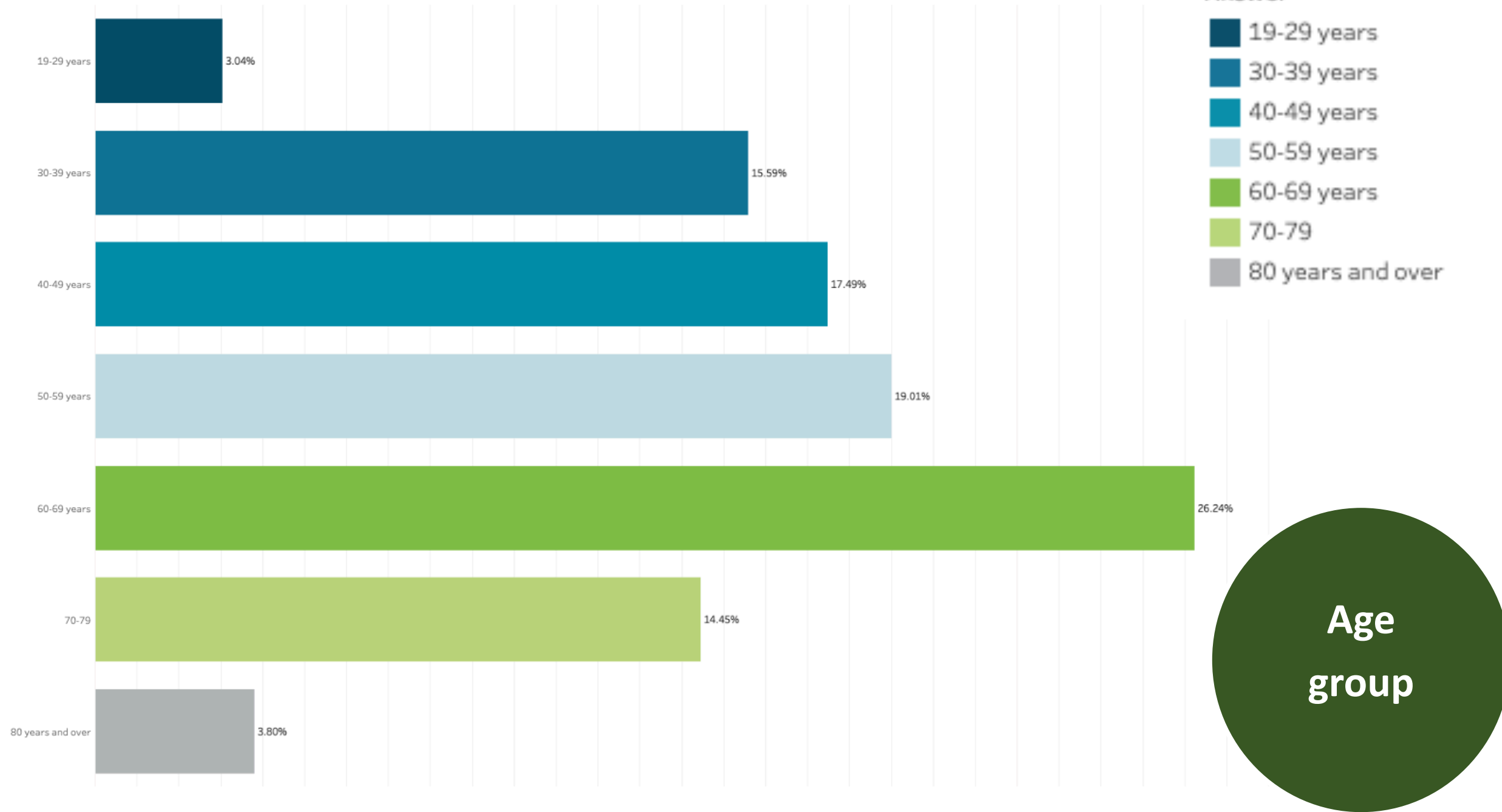
Views of the future - overall Vermont forest economyLooking out over the next decade, are you mostly optimistic or pessimistic about the future potential of the overall Vermont forest economy?(Scale

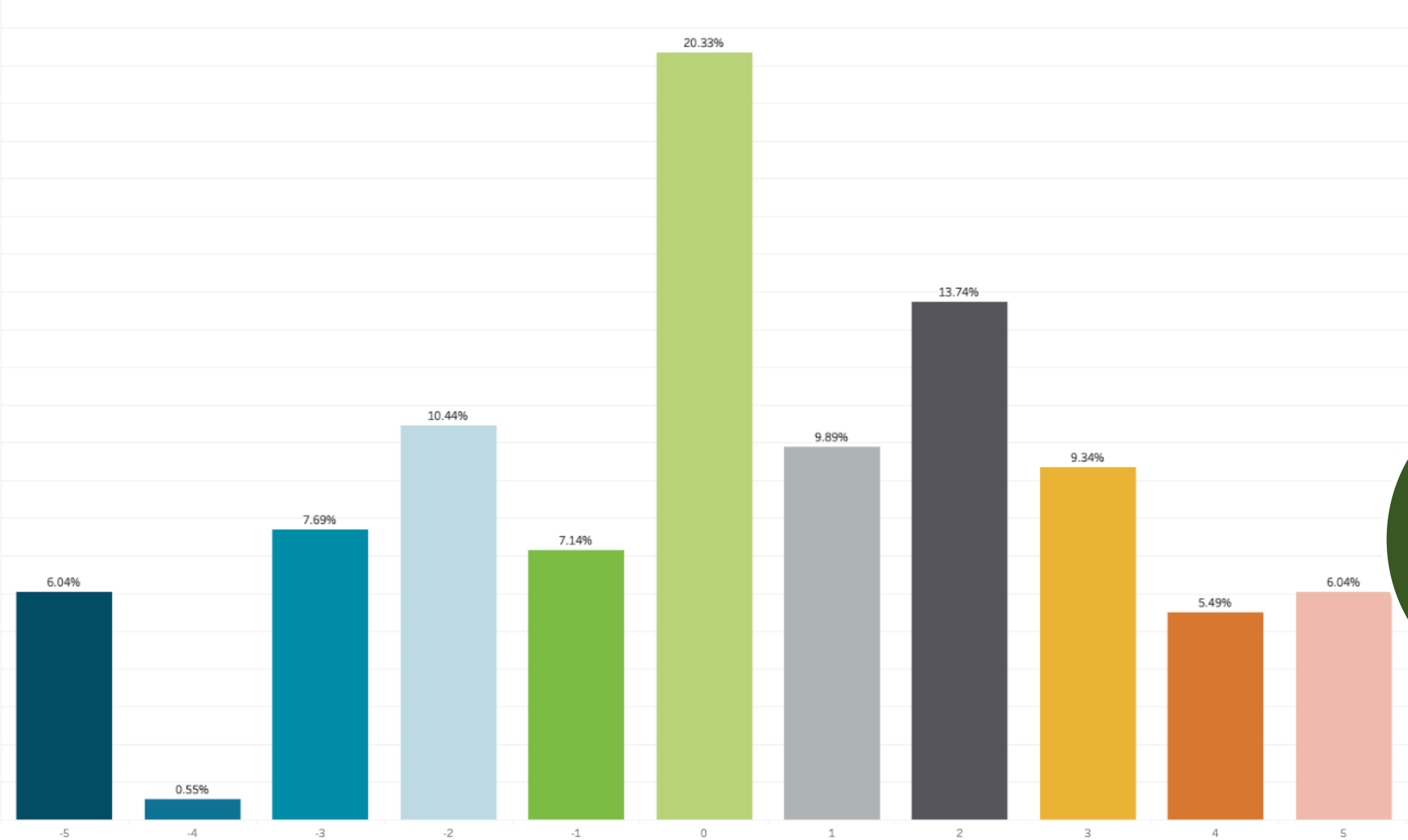cale: -5 = Very pessimistic; 0 = Neutral; +5 = Very optimistic

Primary Association with Vermont
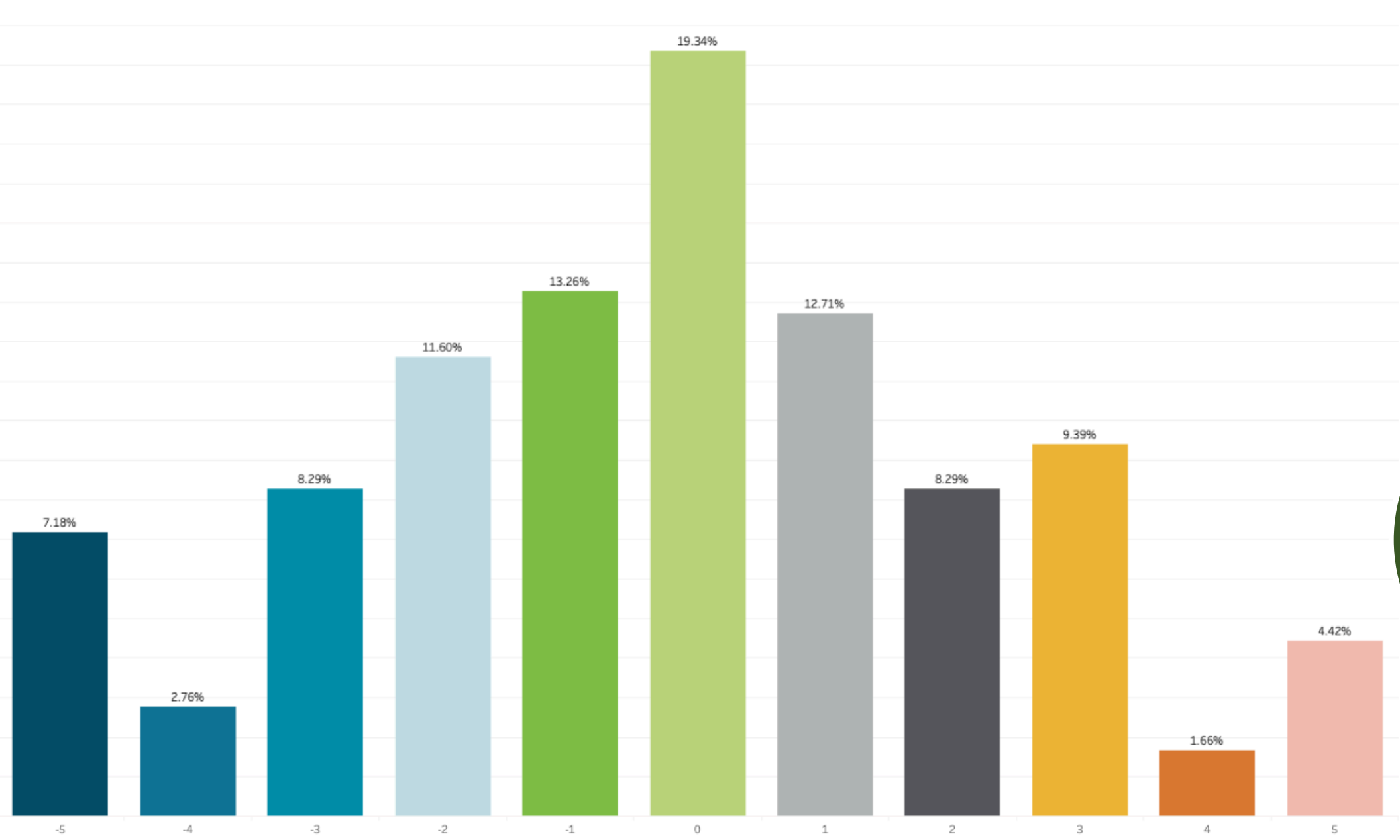(All)

How Long Associated with Vermont
(All)

Age Group
(All)

Where Do You Live
(All)

Answer
- -5. Very pessimistic
- -4
- -3
- -2
- -1
- 0. Neutral
- 1
- 2
- 3
- 4
- 5. Very optimistic

Forest Economy

Chart values:
- -5: 6.04%
- -4: 0.55%
- -3: 7.69%
- -2: 10.44%
- -1: 7.14%
- 0: 20.33%
- 1: 9.89%
- 2: 13.74%
- 3: 9.34%
- 4: 5.49%
- 5: 6.04%

Overall contribution to Vermont's rural characterThe working forest landscape has long been a key factor that shapes the rural character and identity of Vermont. This spans a range of public values such as distinctive scenery, fall colors, unique products like maple syrup, building styles and materials, and the quality of Vermont life. There has historically been strong support for the working landscape and working forests in Vermont. Over the next decade, do you see Vermont's working forests becoming more, or less, important, in terms of enhancing and preserving the rural character and identity of Vermont? (Scale
Scale: -5 = Much less important; 0 = Same; +5 = Much more important

Primary Association with Vermont
(All)

How Long Associated with Vermont
(All)

Age Group
(All)

Where Do You Live
(All)

Answer
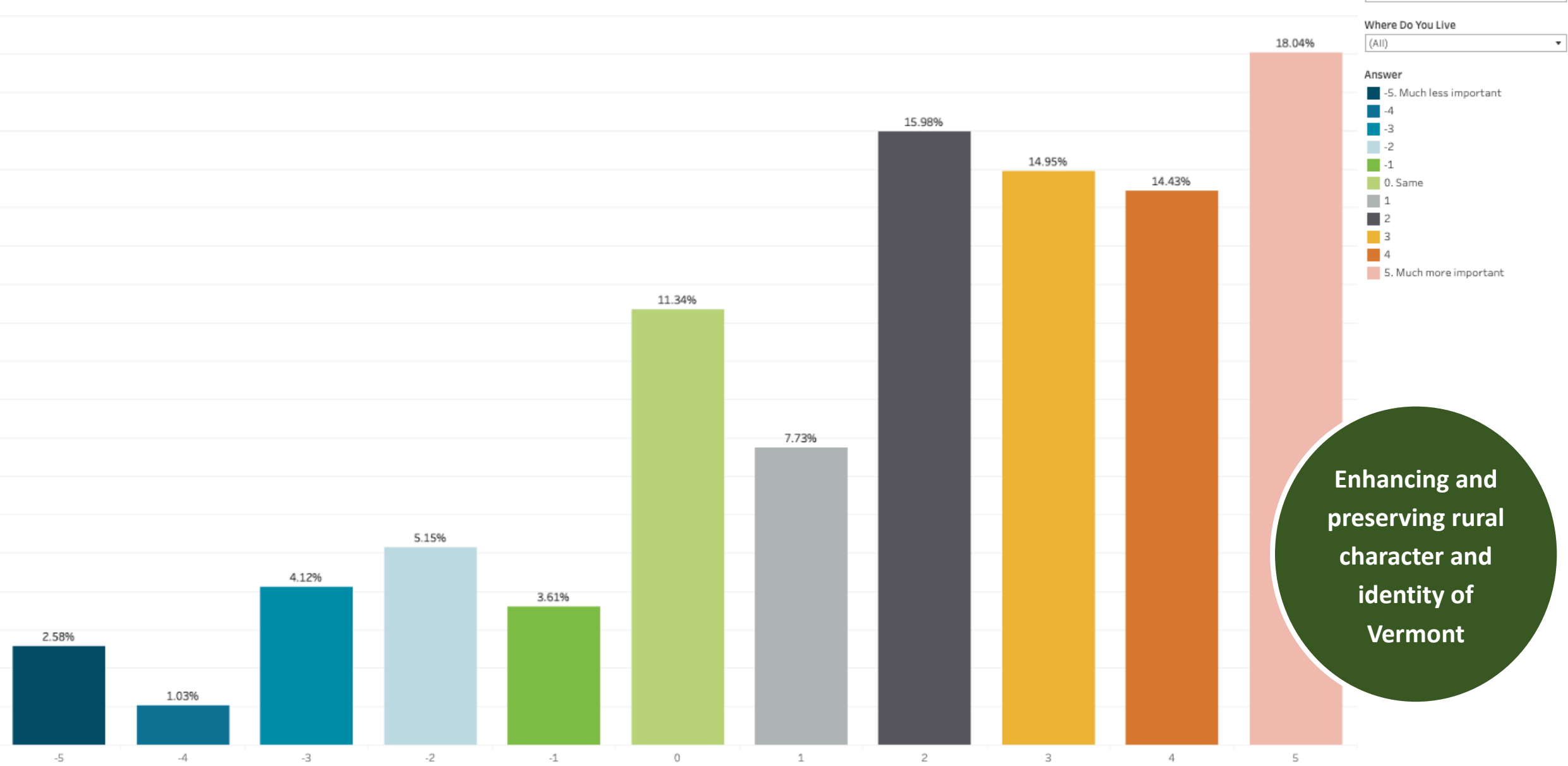- -5. Much less important
- -4
- -3
- -2
- -1
- 0. Same
- 1
- 2
- 3
- 4
- 5. Much more important

Enhancing and preserving rural character and identity of Vermont

Vermont Forest Future - Think-Tank process

Part 1 – Forces of change

- Macro trends shaping the future

- Identify key drivers shaping the future of the VT forest economy

- Rate 'future impact' of key drivers

Part 2 – Future Scenarios

- Develop plausible scenarios of the future

- Examine implications and outcomes

- Identify expected and preferred futures
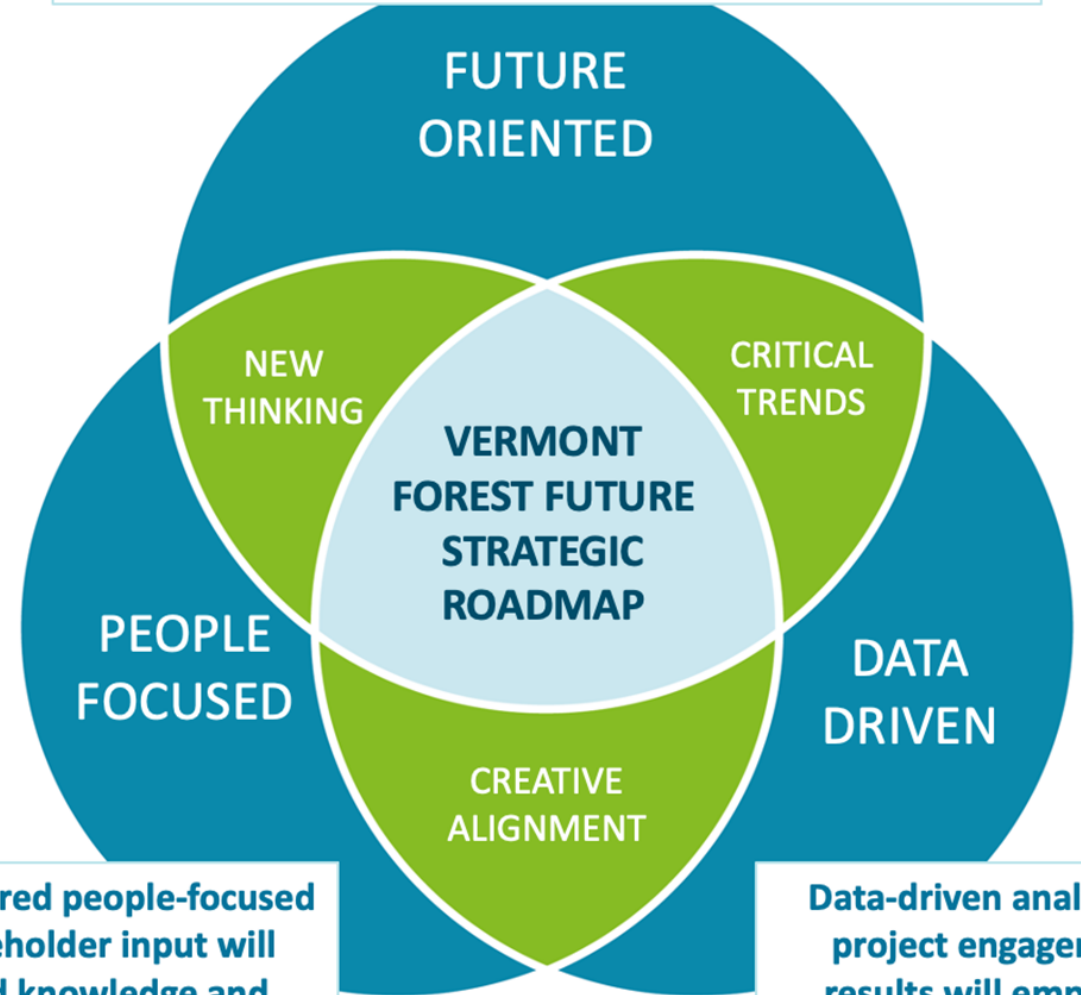
- Begin identifying strategic pillars

Dec 13 2022

Jan 31 2023

The Vermont Forest Future Strategic Roadmap will identify **actionable strategies** to strengthen, modernize, promote, and protect Vermont's forest products sector and the broader forest economy.

What is the future of Vermont's forest economy? This project will examine critical emerging trends in forested areas nationwide to create an understanding of local implications and opportunities.

FUTURE ORIENTED

NEW THINKING

CRITICAL TRENDS

VERMONT FOREST FUTURE STRATEGIC ROADMAP

PEOPLE FOCUSED

DATA DRIVEN

CREATIVE ALIGNMENT

Structured people-focused stakeholder input will build knowledge and strengthen the statewide forest economy.

Data-driven analysis of project engagement results will empower leadership to make research-based decisions.

VERMONT FOREST FUTURE STRATEGIC ROADMAP

Key Drivers:

What key drivers do you think are most important for the future of the Vermont forest economy (and forest products sector)?

(Key drivers are events, trends, developments, catalysts or forces that actively influence or cause change.)

Table brainstorm

Key Drivers Identification

1. Forest conditions
2. Adaptations to climate change impact
3. Role of land use regulations
4. Consumer interest in wood products
5. Changes in workforce availability
6. Social environmental awareness
7. Generational shift in values
8. Changes in land ownership (& parcel size)
9. Cost of energy needed for production
10. Owner attitudes toward forest management
11. Outside pressures on Vermont
12. Supply chain dynamics and changes
13. Changes in forest economy transportation
14. Public investment in forest economy
15. Impact of emergent carbon markets
16. Vermont culture for community scale
17. Societal polarization
18. Industrial cross sector innovation
19. Departure of younger generation
20. Technical innovation
21. Global market pressures
22. Outdoor recreation

VERMONT FOREST FUTURE STRATEGIC ROADMAP

DRIVER NAME:

Key emergent high-level trends associated with this driver:

1.

2

Potential impacts on the Vermont forest economy over the next decade:

Building an understanding of each driver

What is the big "FUTURE-SPLITTING QUESTION" for this driver?

Future predictions - how impacts may "play out" for this driver over the next decade:

1.

2

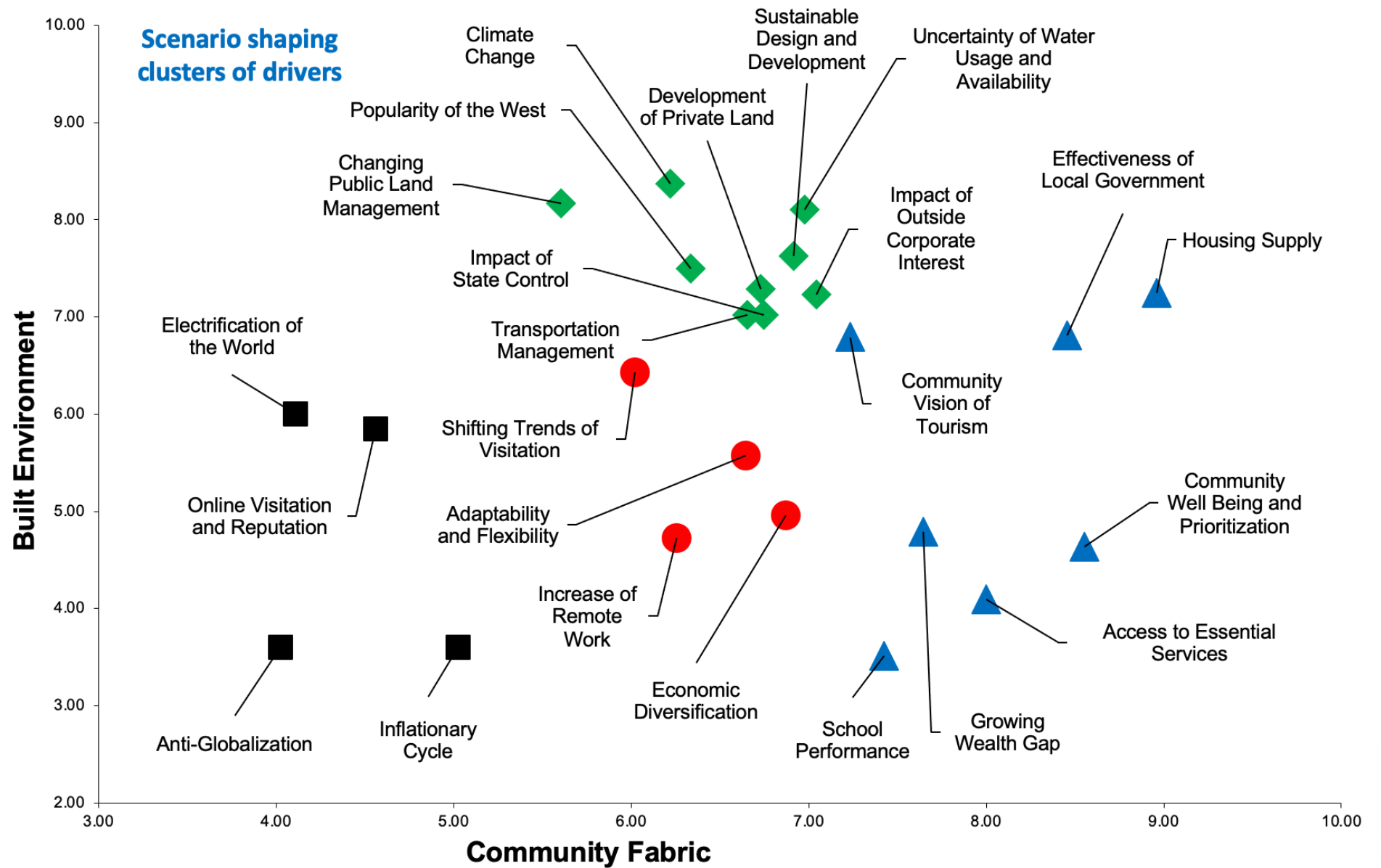**Building an understanding of each driver**

Rate each driver in terms of likely future impacts on the following dimensions of the forest economy.

IMPACT SCALE: 1 = Low relative impact; 10 = Very high relative impact

Driver	Dimensions			
	Overall Forest Economy	**Quality of Working Forests**	**Innovation in Forest Product Enterprises**	**Demand for VT Forest Products**
1				
2				
3				
4				
5				
6				
7				
8				
9				

Rating future impact of each driver – individual scoring

Future-splitting clusters of drivers

Development trajectory

- Changing Public Land Management
- Popularity of West
- Climate Change
- Development of Private Land
- Sustainable Design and Development
- Uncertainty of water usage and availability
- Impact of Outside Corporate interest
- Impacts of State Control
- Transportation Management

Community fabric

- Community vision of tourism
- Effectiveness of local government
- Housing supply
- Community well-being and prioritization
- Access to essential services
- Growing wealth gap
- School performance

Additional key drivers

- Shifting trends of visitation
- Adaptability and flexibility
- Increase in remote work
- Economic diversification

future→iQ

Create **Future Intelligence**™

MOAB
Plausible
Scenario Matrix
2030

EXAMPLE ONLY

Strong local influence
Local entities exert strong influence on regional decision-making, especially for future land use and developments, including transportation and tourism infrastructure. Environmental impact and sustainability are key considerations.

Scenario A

Scenario B

Low intervention
Local decision-making is generally 'hands-off' with low intervention. Sectors such as housing markets, tourism and economic development are allowed to evolve and change in an unimpeded manner. The focus is on individual freedom and self-reliance.

Community   fabric

Development trajectory

Intentional prioritization
Deliberate investment is made in building local community amenities and services. Community impacts are prioritized in shared decision making, and community capacity and connectivity is enhanced. The focus is on creating a fair and respectful community.
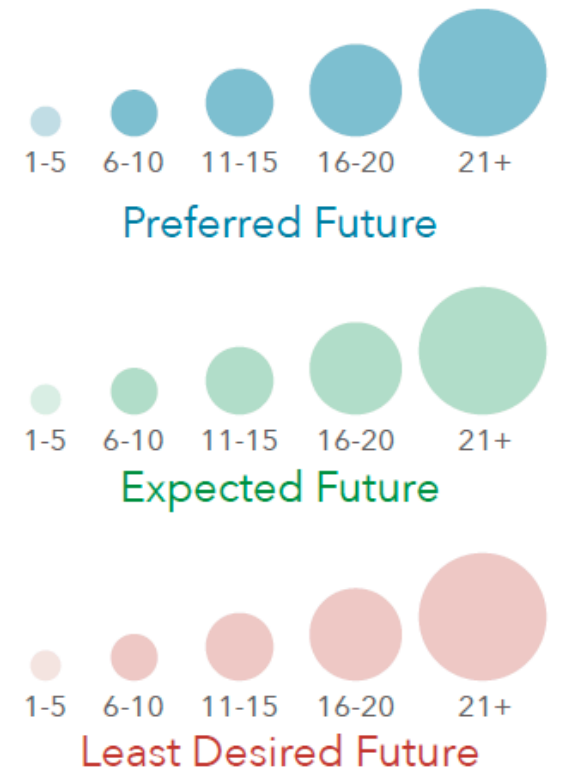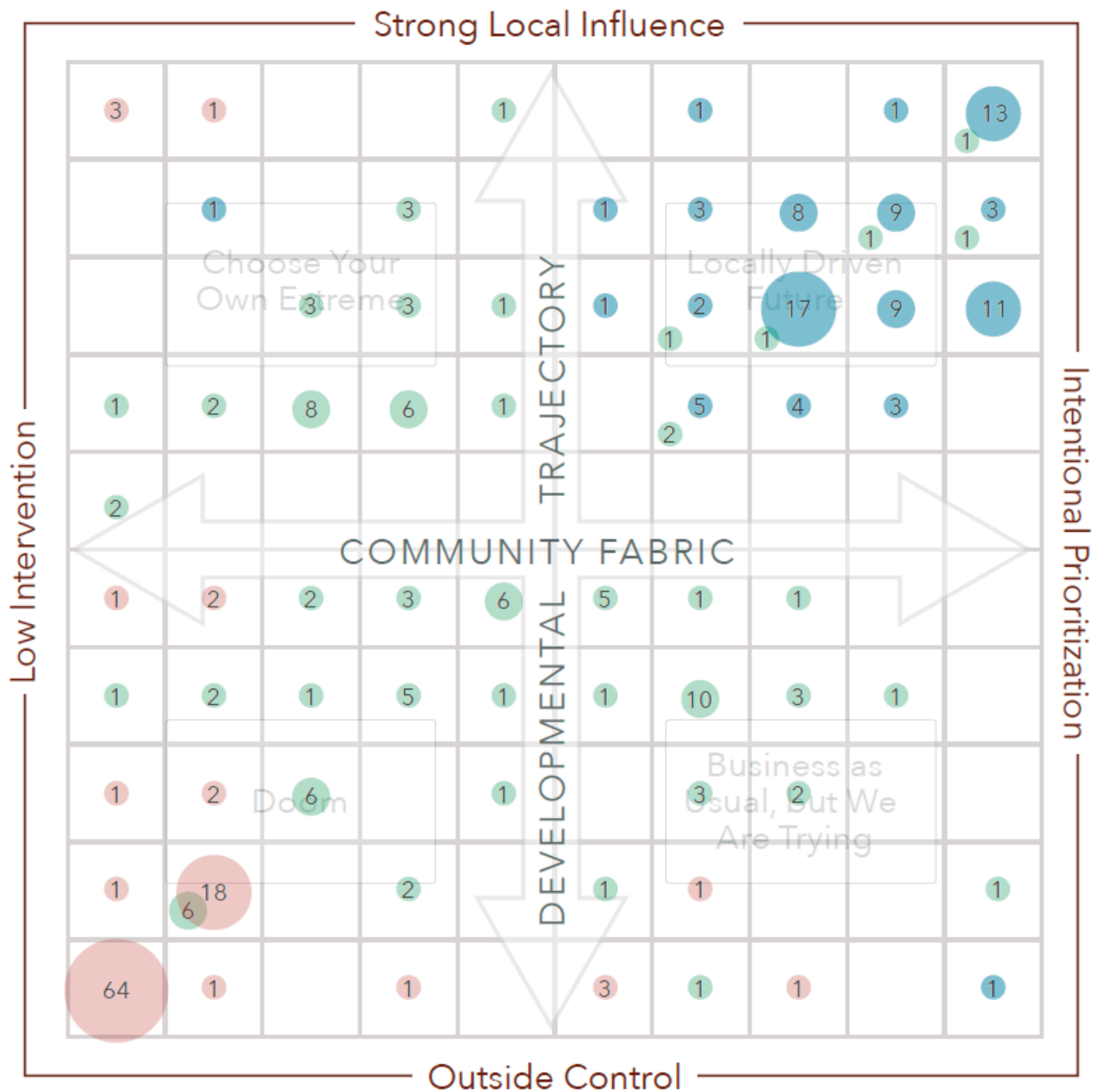
Scenario D

Scenario C

Outside control
Outside forces dominate critical decisions, which shape future land use and resource allocation. Priority is given to economic growth, spurring increases in regional visitation, development and population.

THE CITY OF MOAB
TOMORROW TOGETHER

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Create Future Intelligence™

Vermont Forest Future - Think-Tank process

Part 2 – Future Scenarios

- 9:30 am - Recap on Think Tank Part 1
- 10:00 am - Develop plausible scenarios of the future
- 11:30 am - Examine implications and outcomes
- 12:00 am - Identify expected and preferred futures
- 12:15 am - Begin identifying strategic pillars
- 12:30 am - Finish

Jan 31
2023

Vermont Forest Future - Advisory Panel

Tasks for January

- **Help push out survey #1** (target 1,000)
- **Attend Think-Tank Part 2 + provides list of potential invitees**
- **Sub-committee volunteers to refine scenario matrix**