

FINAL SUMMARY REPORT
Securing Land Tenure Rights for Heirs Property Owners
Land Tenure Specialists' Activities and Accomplishments

Background

The Land Tenure Specialist's proposed scope of work included preparation of training modules and delivery of workshops on land ownership records, title searches, deeds, court records, and how to preserve documents. In reaching out to potential project partners, the SARE project team learned that The Conservation Fund's Resourceful Communities Program had secured USDA-Natural Resources Conservation Service funding to develop and deliver the same workshops. Since the Resourceful Communities workshop leads, Peg Kohring Cichon and McIntosh Sustainable Environment and Economic Development (McSEED), were able to reach the same target populations, the Land Tenure Specialist position was reconfigured to a team including Peg, McSEED, Mikki Sager (the original team member), Livia Marques of Food Driven Strategies and Savi Horne of Land Loss Prevention Project, all with extensive experience in working with farmers, landowners and communities. The scope of activities was broadened and deepened, to build on landowner input and lessons learned through the workshops and focus on the following impact areas, primarily in the Build and Educate categories:

- **Technical Assistance:** Providing technical assistance to producers, landowners, tribes and communities, including sharing information, providing one-on-one technical assistance to increase access to public dollars and providing direct connections to agencies, funding and other resources that have previously been functionally inaccessible.
- **Policy:** Informing public policy development through participation in conferences, workshops, focus groups and individual interviews that enabled sharing of information gleaned through Discover phase, and learned from producers' and partners' lived and work experiences.
- **Leveraging Resources:** Increasing access to funding, markets and other resources as a means of building skills and capacity for the long term, especially through network connections and new partnerships.
- **Models:** Developing models that are rooted in producers' and landowners' realities, are culturally informed and can influence future programming, policy development, and community and producer/ landowner efforts.
- **Workshops:** Hosting virtual and in-person workshops to build skills; transfer knowledge about heirs property, estate planning, wills, trusts and LLCs; and build a base of trust for additional follow-up support to individuals and families.

Having heard clearly during the Discover phase that heirs property status is only one of multiple, intersecting and inter-connected issues typically faced by historically underserved producers and

landowners, the Land Tenure Specialist team activities were designed to round out the range of support needed to understand, stabilize and advance land tenure. The team included:

- **Livia Marques**, with 20 years' experience with USDA; plus three years with the W.K. Kellogg Foundation, and 7 years in the nonprofit sector. Livia is experienced in food and land justice, working with historically underserved individuals and communities to create locally-owned and -led, just food systems.
- **McIntosh S.E.E.D. (Sustainable Environment and Economic Development)**, a Black-led and -serving community-based organization, with experience in food value chain development, landowner assistance, sustainable agriculture and forestry, community organizing, adult education, public policy, community economic development, and more.
- **Peg Kohring Cichon**, with more than four decades of experience in national and regional conservation, negotiating and acquiring natural and working lands, and working with tribal governments and historically underserved farmers, landowners and communities. Peg excels at coaching, technical assistance and adult/ community education.
- **Mikki Sager**, with 30 years' experience working with underserved individuals, families, and communities, to leverage conservation/ environmental dollars to address social and economic challenges. She has worked throughout the South and Appalachia on natural resource-based economic development; community food systems and conservation.
- **Savi Horne**, Executive Director of Land Loss Prevention Project, one of the project team leaders and a nationally-renowned thought leader, advocate and movement leader for strengthening and growing land tenure.

SUMMARY TALLY OF CRITICAL PROJECT ACTIVITIES

Over the course of the two-year project period, the Land Tenure Specialist team engaged in the following producer/ landowner/ tribal/ community support activities:

- **Technical Assistance:** A broad range of technical assistance was provided to 35 producers (including securing farm numbers, coaching and assistance in preparing EQIP applications and more); 96 individual landowners and 8 landowner families comprising more than 85 individuals; one federally recognized tribal nation; and at least four excluded communities/ historically underserved community-based organizations (CBOs).
- **Policy:** Provided thought partnership, input and policy recommendations to Federal Reserve Board, USDA-Forest Service, Albemarle-Pamlico National Estuary Partnership, and national intermediaries (The Wilderness Society, Environmental Defense Fund, Aspen Institute), regarding land/ food/ economic/ environmental/ climate challenges.

- **Leveraging Resources:** During the project period, helped 6 tribes, 8 rural food hubs and three community-based organizations secure over \$3.75 million in funding to support general operations, land acquisition, food businesses, local food systems and more.
- **Models:** 94 individual producers strengthened their operations through increased access to markets, support to producer cooperatives, and access to shared equipment.
- **Workshops:** Virtual and in-person workshop participants included 34 producers, 452 individual landowners, and over 150 community leaders from throughout North Carolina, South Carolina, Georgia and Alabama. An additional 6 historically underserved community groups developed plans and accessed funding through support in developing community-led food system models.

KEY LESSONS LEARNED

Given the diversity of geographies, communities, markets, and other components of food systems, there are many lessons to be learned from this timely research initiative. Many of the lessons were a direct result of the project team building relationships of trust with producers and landowners and having a broad range of experience and expertise on the Land Tenure Specialist team, to help landowners work through the various circumstances related to their properties. The key lessons learned by the project team and the landowners include:

- **Family dynamics and landownership histories often create barriers to sustaining and growing land tenure.** Heirs property is sometimes a function of historic lack of access to legal assistance that could be trusted, or lack of adequate finances to secure legal assistance in writing wills. In other cases, heirs property resulted from farm families wanting heirs to work collaboratively to keep the land in the family. The latter dynamic is especially challenging in families where descendants have dispersed to other geographies and become disconnected from the land. Making mediation services available is often key to resolving differences or making decisions by consensus. Legal structures, such as family LLCs, also provide an important tool for those with heirs property.
- **There is a strong need for in-depth education led by trusted individuals and entities, so family members across the generations can better understand “what they own.”** The Landowner 101 and 201 workshops hosted by McIntosh SEED and Resourceful Communities helped over 200 families receive all the publicly available documentation about their land, and then understand what the deeds, maps, and other documents meant and how they could be used to better manage lands for food, timber and other products. Landowners learned how to walk their land and property boundaries, what to look for and conditions or situations to be concerned about. They learned about their soil types, whether they had wetlands on their properties that were being taxed at developable land rates, and whether their farm and forestlands qualified for “present use value” classification, which enables families to significantly reduce their property tax burdens. If their land qualified for present use value, families learned what procedures needed to be followed in order to reduce their property taxes.

- The project team learned that many landowners are unaware of how to recognize and deal with predatory tactics used by outsiders to hasten land loss. Many unscrupulous individuals prey on elderly people of color who are perceived to be less informed about their property rights; or may be seen as easily intimidated into making disadvantageous decisions about their land. Landowners learned about one such category of predators: Timber buyers who offer immediate cash for timber, suggesting the landowner might use it to pay annual property taxes or for a funeral; when, in fact, the dollar amount being offered is not even worth pennies on the dollar of the timber value. (This practice is so prevalent in the South that there is a name for the unscrupulous timber buyers – they are called “pinhookers” – and many are known to read local obituaries and target widows with forested properties, on the theory they may know less about the value of their forested landholdings than their deceased spouses did.)
- In many cases, the Land Loss Specialists and Technical Assistance Providers heard stories that made it clear that racism, power and privilege are significant factors that can cause the loss of significant lands and/ or the value of trees or other improvements. For example, we heard about multiple cases of deeds to properties owned by people of color being “lost in a Courthouse fire.” One family reported that the deed in the Courthouse showed their family property being transferred to a County employee, reportedly by their elderly grandparent signing the document with an “X” when, in fact, that grandparent was fully literate and always signed their full name to all documents.
- We also heard stories from landowners who had gone out to walk their lands and found that trees on their properties had been harvested when an adjoining landowner harvested timber stands on or near the property lines. In a small handful of cases, the encroachment onto their lands was inadvertent; but in a number of other cases, it was a blatant case of trespass and theft of timber. In all cases, landowners learned what their legal rights are and how to file claims to recoup the value of their trees that were cut.
- Landowner families also learned about “adverse possession,” and how an adjoining property owner who is not legally challenged for building a road, a building or other improvements on your property for a certain number of years could then claim full ownership of those portions of your land.
- In all cases, the project team learned the value of educating and engaging multiple generations to facilitate improved uses and management of family lands and better leveraging available technologies to ensure families have the full range of tools to manage or retain family lands.
- **There are resources that could, theoretically, be leveraged from the conservation movement, although many of the policies, priorities and metrics that determine the availability of those resources need to be tweaked or adjusted to “work” for heirs**

property and historically underserved producers, landowners and communities.

There are unprecedented levels of federal and state conservation dollars available, and the Biden Administration’s Justice40 Initiative, in theory, should make it easier for vulnerable communities and landowners to access those conservation dollars. However, if the decision-making criteria and review panels are not adjusted to more directly address the on-the-ground conditions in low-income communities and communities of color, the federal dollars will continue to be functionally inaccessible.

- For example, larger-acreage properties are often prioritized by USDA and other public conservation agencies in reviewing applications for assistance in purchasing conservation easements. We know from previous land use/landownership mapping exercises and from experience working in low-income communities and communities of color that landownership patterns in those communities skew heavily toward small-acreage parcels, with many of those same parcels also scoring as high priorities for water quality protection, species habitat protection, wetlands protection and more. Yet the same parcels would not be ranked as high priorities because of the acreage sizes, an important factor that has resulted in the historic exclusion of small-acreage producers and landowners from accessing those public dollars.
- Several other lessons learned from our experience include:
 - Funds are more readily accessed by small-acreage and other “non-traditional” landowners when agencies set aside a portion of available funding for historically underserved landowners.
 - Likewise, the match requirements are a barrier for low-profit producers or low-income landowners.
 - And, given that federal dollars have been used to cover conservation easement purchase transaction costs, such as survey, environmental assessments, legal fees, and closing costs, we believe that conservation easement dollars might be more readily accessed by historically underserved and limited-resource producers and landowners if clearing heirs property status were to be designated as an eligible transaction cost.
 - A future research project might focus on whether some of those revisions might be achieved through administrative changes, or whether legislative changes are required.
- **Land tenure is a complex issue comprised of many seemingly disparate yet interconnected factors that impact BIPOC producers’ and landowners’ abilities to retain and grow ownership of land.** The optimal strategies to remove or reduce barriers and grow opportunities for historically underserved producers and landowners will emphasize multi-solving “packages” of support and resources to address the multiple issues. This may include helping producers and landowners secure legal assistance, mediation and structuring of family LLCs; increasing access to markets and federal/ state/ local programs; providing intermediary and organizing support to connect to other landowners or producers; and more.

FINAL DETAILED REPORT on
Land Tenure Specialists' Activities and Accomplishments

Securing Land Tenure Rights for Heirs Property Owners

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- **Livia Marques**, who has worked in the public and private sectors, with 20 years of employment with the US Department of Agriculture, including serving as the founder and lead for the People’s Garden and the first Latina State Conservationist; plus three years as a program officer with the W.K. Kellogg Foundation, and 7 years in the nonprofit sector. Livia has extensive experience in food and land justice efforts and specializes in working with historically underserved individuals and communities to create locally-owned and -led, just food systems.
- **Peg Kohring Cichon**, an accomplished and innovative leader in the national conservation movement, with more than four decades of experience in negotiating and acquiring natural and working lands, and working with tribal governments and historically underserved farmers, landowners and communities. A fifth-generation family farmer and pastor, Peg has created and led educational workshops, and has also provided extensive coaching and technical assistance for land conservation professionals, farmers and prospective landowners seeking to acquire land.
- **Mikki Sager**, who has over 30 years’ experience in working with historically underserved individuals, landowner families, and communities, to help leverage conservation and environmental dollars to address social and economic issues. She has extensive experience in project planning, development, implementation and evaluation; natural resource-based economic development; community-based food systems and conservation; grantmaking, public policy and more; and has worked throughout the South and Appalachia, as well as nationally.
- **McIntosh S.E.E.D. (Sustainable Environment and Economic Development)**, a Black-led and -serving community-based organization, with a staff of highly accomplished professionals experienced in food value chain development, landowner assistance, sustainable agriculture and forestry, community organizing, adult education, public policy, community economic development, and more. McSEED owns and manages a 1,148-acre community forest that serves as a venue for “hands-on” learning experiences for farmers and landowners alike.
- **Savi Horne**, Executive Director of Land Loss Prevention Project, one of the project team leaders and a nationally-renowned thought leader, advocate and movement leader for strengthening and growing land tenure.

Note: All activities and accomplishments described below were accomplished under the Southern SARE-funded project. Additional activities that were supported by non-Southern SARE funds are described at the end of this report as In-Kind Contributions toward the project mission and goals.

Discover Phase

Survey: In addition to structuring project activities based on the overall Discover phase, McSEED created and distributed a Landowner Participant Survey to capture the impact of the Georgia landowner network and to gauge and increase the effect of outreach efforts. (See *Attachment A*)

- 100% of respondents received follow-up support following the webinars (Landowner 101, Landowner 101 Follow-Up webinar, Landowner Workshop: Know What You Own, and Estate Planning)
- Support received from McSEED included:
 - Determining options for property – 25.81%
 - Addressing land ownership issues such as heirs property, encroachment, etc. – 16.13%
 - Lowering land tax bills – 6.45%
 - Securing farm numbers – 9.68%
 - Arranging visits with USDA-Natural Resources Conservation Service – 12.9%
 - Submitting EQIP applications – 9.68%
 - Connecting to other resources, organizations, agencies – 16.13%
 - Helping with cattle questions – 3.23%
- 55.56% of respondents reported applying for NRCS funds after receiving 1-on-1 support from McIntosh SEED staff.
- The support that was seen by respondents as being most helpful included:
 - Contacts for land management
 - Application support and connections to the appropriate resources
 - Resources to carry out planned projects
 - McSEED’s Outreach Manager, Tyrah Ward!
- When asked if there is anything that still prevents landowners from pursuing NRCS funds, the responses included:
 - My family can’t come together on anything.
 - Learning the terminology and the understanding and meanings.
 - I’m not in a position to apply at this time.
- When queried about what additional support would help landowners adopt land management practices on their property, responses included:
 - More educational offerings.
 - Visiting and learning from peer landowners.
 - Help in formulating goals and new opportunities specific to my property.
 - Resolve landowner issues (boundary issues, landlocked properties, clear title/ heirs property, etc.).
 - Direct referrals to consultants and other experts.
 - Financial support – grants.
 - Landowner leadership education.
 - How to escalate issues within the NRCS Organization and USDA.
 - Success stories and their methods, in organizing, finding answer, and legacy.
 - Farm help pay/ barter/ exchange, ways to get the helping hands and ways to get help paying them.

- 20% of respondents were 31 to 50 years old, 10% were 51 to 65 years old, and 70% were over 65 years old.
- 20% of respondents owned 0 to 10 acres; 30% owned 11 to 50 acres; 40% owned 51 to 150 acres and 10% owned 151 to 500 acres
- 16.67% live on the property; 25% live within 25 miles of the property; 41.67% live in the same state but more than 25 miles from the property; and 16.67% live in a different state than the property.
- 30% of respondents purchased the property from a non-family member; 10% responded that the land had been in their family for 2 generations; 20% of the properties had been in the family for 3 generations; and 40% of the properties had been in the family for four or more generations.

Build Phase

Based on the discussions and information generated during the Discover phase, the Land Tenure Specialists engaged with producers, landowners, stewards, agencies, tribal nations, food sovereignty and community organizations and more to provide the following support designed to inform public policy and provide education to the broad range of partners helping to implement food systems efforts.

Technical Assistance: *Providing technical assistance to producers, landowners, tribes and communities, including sharing information, providing one-on-one technical to increase access to public dollars and providing direct connections to agencies, funding and other resources that have previously been functionally inaccessible.*

- Conducted a family consultation with three (3) siblings concerning their family's timber land and heirs' property issues. Staff assisted with establishing the family's land management goals and the next steps for establishing their farm records.
- Held a conference call to provide family tree assistance to one (1) family. The family was encouraged to gather as much information on their family as possible to create a successful family tree.
- Held a face-to-face meeting with the G____ Family Estate family members (5) to discuss plans and next steps for their heirs' property. There are over 50 heirs involved with the property and the latest deed was drawn in the 1800s. The family is desperately seeking legal advice to resolve all issues. They have been connected to an attorney for further guidance.
- Connected (88) landowners to Attorney Mavis Gragg to discuss Estates, Heirs Property Issues, Trusts and LLCs.
- Connected (15) landowners to local attorneys to discuss legal issues such as: re-deeding, Estates, Trusts, LLCs.
- Connected three (3) landowners to an Estate Planning Attorney to resolve legal issues.

- Connected four (4) landowners to a local surveyor to inquire about boundary surveys. The surveyor agreed to service all McSEED’s landowners who are in need of boundary surveys and complete the services in a timely manner.
- Family mediations:
 - Met with Georgia Heirs Property Law Center to discuss their intake process and how they would (if possible) assist landowners in Georgia.
 - Connected one (1) landowner with an Heirs Property/Estate Planning attorney. As a result, the landowner received an estate plan, medical plan, and probates of late parents from the attorney.
 - Traveled to Temple, Georgia to meet with families needing assistance in managing their forested properties. Discussed the importance of estate planning, resolving heirs’ property issues and boundary surveys to over 15 attendees. Over 500 acres sat in one room. As follow-up, will spend a week with the families to help them acquire farm numbers and coordinate site visits with the Georgia Forestry Commission foresters and/or local arborists.
- Provided tribal and funder network connections to [Indigenous East](#), and emerging Native women-led collaborative working to connect Indigenous-led protected areas spanning the length of the eastern United States.
- Provided technical assistance and support to the Nansemond tribe’s nonprofit arm, which was seeking farmland on the Nansemond River to produce food and reconnect with the river for spiritual practices and cultural ceremonies.
- Provided support on conservation tools and resources to Black Food Justice Alliance (the organization and several of its members).
- Provided technical assistance and support to “next gen” of Black landowner family regarding how conservation easements work, and providing connections to conservation tools and resources.
- Provided technical assistance and support to collaborative effort, “Reconnecting, Remembering, Relearning with Land.”
- Provided community and landowner network contacts and technical assistance to national conservation organization regarding strategies for partnering equitably with majority-Black town government to fundraise for, and establish, a community forest that may be donated to the local government.

Policy: Informing public policy development through participation in conferences, workshops, focus groups and individual interviews that enabled sharing of information gleaned through Discover phase, and learned from partners’ lived and work experiences.

- Provided support to the USDA-Forest Service in identifying barriers that communities and landowners of color encounter to participation in USFS programs. (*See Attachment B*) The team also provided suggestions of potential administrative or programmatic changes that would increase accessibility to the programs. Several recommendations were incorporated into USFS programs in the Inflation Reduction Act, including reduced minimum-acreage requirements for eligibility for the Forest Legacy program and additional review points for historically underserved landowners.
- Participated in Zoom calls, interviews and focus groups hosted by The Wilderness Society to inform their programming and public policy recommendations regarding food and land justice.
- APNEP Tribal Coastal Resilience Project: Provided input in Zoom calls, interviews and focus group sessions for multi-year project funded by the [Albemarle-Pamlico National Estuary Partnership](#) and designed to: 1) raise awareness about coastal resilience planning among tribal communities in North Carolina and Virginia, and 2) strengthen networks and relationships between state agencies, tribal governments and non-tribal entities such as the North Carolina Commission on Indian Affairs. The [Phase I Report](#) was released in October 2023, along with a presentation to the [APNEP Leadership Council, October 13, 2023](#). One compelling portion of the report has documented that there are no tribal climate action plans that have been developed for tribal nations in the Southern US. Given the impacts of climate change in the Southern US, this may be an important issue for Southern tribes to consider in the near future.

In preparation for the release of the report, Land Tenure Specialists were approached by APNEP staff and asked to provide brainstorming, technical assistance support and guidance on several proposed follow-up activities, including:

- A one-day workshop on How to Buy Land, to be delivered to the federally recognized Tribes in Virginia and North Carolina. The workshop was developed in November 2023 and would have been hosted by the Albemarle-Pamlico National Estuary Program but was not delivered due to changed host priorities, including a need to check in with tribes about timing and prioritization. The APNEP staff is expected to be in touch in 2024 to schedule the workshop.
- A three-session Tribal partner workshop series on land was developed for tribal entity partners in Virginia and North Carolina. The series included tribal peer presenters, with the three-day agenda focused on 1) How to Buy Land, 2) Ways to Use Land, and 3) Accessing Conservation Funding to Protect Your Land. Similar to the one-day workshop described above, the workshop series was put on hold but is ready to be delivered in keeping with tribes' and APNEP's scheduling priorities. (*See Attachment D*)
- Conducted research and co-authored chapter on significance of local land ownership and control as key to rural prosperity, at request of Federal Reserve Board of St. Louis. Book entitled, "[Investing in Rural Prosperity](#)" was released in November 2021, chapter was

entitled, “Rural Opportunities: Changing the Narrative and Shifting Ownership of Land” (pages 119 through 131 or see *Attachment E*). The chapter uplifted historical challenges and traumas experienced by people and communities of color; identified resources and proposed public policy changes that can be used to advance and strengthen ownership and control of working lands to advance food sovereignty and land justice.

- Conducted research and co-authored with Chitra Kumar of USEPA a policy brief entitled, “[Stewardship + Equity: Rooting a New Rural Legacy](#).” The policy brief was published by Aspen Institute’s Community Strategies Group and rooted in the premise that rural places, in particular, are at an unprecedented moment of opportunity to act at the intersection of health, economic development, equity, and environment. Effective stewardship of the environment, natural resources, and ecosystem services requires a collection of policies, practices, and investments that embody and center the interests of rural and Native communities – not simply the interests of governments, environmental advocates, or corporations. Addressing existing and historic rural place, race, and class inequities *while* addressing climate impacts is not only the fair thing to do, it is also necessary to meet national carbon reduction targets. *See Attachment F*)
- Participated in focus groups on climate and community resilience, shared case studies and connected the Coharie Intertribal Association (nonprofit arm of the state-recognized Coharie tribe) with Aspen Institute Community Strategies Group. The Great Coharie River Initiative was showcased in [Through Natural Disaster to Prosperity](#), focused on five principles to improve health and economic outcomes for rural communities and Native Nations.
- Participated in Zoom calls, interviews and focus groups with the Conservation Finance Network and USDA-Forest Service regarding the Forest Legacy program, which has historically served affluent landowners. In addition to learning about program priority changes in the Inflation Reduction Act that advanced equitable grantmaking in the program, suggested that clearing heirs property status be included as an eligible transaction cost for Forest Legacy projects, just as surveys or Phase I environmental assessments are eligible transaction costs. The suggestion was made based on analysis of input from the Discovery phase, along with lived and work experiences of partners. USDA-FS representatives considered the suggestion and verbally indicated willingness to work with state forestry agencies (which administer the federal funds) to approve clearing heirs property as eligible transaction costs.
- Provided historical data, input and support to USFS researchers about the [McIntosh SEED Community Forest](#) and connecting with McIntosh SEED, which was included in recently-released publication entitled, “[Research Paper: Characterizing Community Forests in the United States](#).”
- Provided Environmental Defense Fund with connections to producers, landowners and BIPOC community leaders impacted by flooding in the wake of hurricanes; and participated in focus group on Flooding Resiliency in North Carolina: EJ and Community Issues, hosted on January 13, 2023. Provided input and challenges faced by BIPOC

producers and communities, particularly in eastern NC and the Sandhills region. Raised specific challenges faced by families with heirs property land, and the need for specific policies to be advocated for by EDF and other environmental groups. The final report, “Increasing Flood Resiliency Coordination in North Carolina at the State and Regional Level,” was released in June 2023 (*see Attachment G*) and informed EDF’s [policy agenda](#) for flood resilience in North Carolina.

Leveraging Resources: *Increasing access to funding, markets and other resources are important complements to building skills and capacity for the long term, especially through network connections and new partnerships.*

- McSEED met with Enviva Heirs Property Fund to discuss a possible partnership, that would create a pipeline for landowning families throughout Enviva’s operational footprint to access financial support via the Enviva Heirs Property Fund. This access may include a variety of support resources, including helping procure the professional services necessary for the families to achieve clear and marketable title to their land assets, then assisting the families in developing sustainable farming, commercial, and land management practices
- Assisted federally recognized tribes in Virginia and rural community food hubs in North Carolina in connecting with, and being included in the USDA-AMS Southeast Regional Food Business Centers project. This will result in \$1.25 million of federal funding supporting existing food justice and food sovereignty efforts over the next five years.
- Supported a Black-led, community-based organization in partnering with a national nonprofit conservation group to submit a \$1.5mm grant request to a national corporation. The application was successful and included support to acquire land and an office building, develop a plan for a Youth Food Corps, support improvements to land assets, and provide general operating support. During the project planning process, helped the CBO develop an “equitable partnership agreement” rooted in the values of equitable collaboration. Supported the same community-based organization in connecting with funders, which resulted in the organization securing over \$1mm in private philanthropic support for general operating support as well as to pay off debt on the land assets.

Models: *Developing models that are rooted in producers’ and landowners’ realities, are culturally-informed and can influence future programming, policy development, and community and producer/ landowner efforts.*

- Worked with Land Loss Prevention Project to support a BIPOC young farmer’s family in connecting with landowner willing to sell family farm and forested property. Connected prospective producer’s family with [Working Lands Trust, Inc.](#) (WLT), the only land trust in NC dedicated solely to protecting working farms, forests and waterfronts. Structuring the transaction to leverage conservation tools as a model for increasing ownership of land for food production and climate justice activities. WLT will purchase the land with philanthropic dollars, enter into lease with option to purchase agreement with young

farmer's family, sell a working lands conservation easement to reduce the purchase price for young farmer's family, and ensure production on the land in perpetuity.

- Participated in [Appalachia Funders Network](#) convenings and webinars on natural disasters and creating community climate resilience; and advancing land ownership and control for food production. Provided community- and landowner-informed examples of natural resource and conservation tools/ funding that can be used to support disaster recovery and community resilience.
- Conducted research on federal conservation programs and provided project planning, guidance and input for “tribal conservation toolbox” project being developed by First Nations Development Institute and Native American Rights Fund. Included support in securing initial funding from Doris Duke Foundation; providing information on how conservation tools and resources have historically been used, especially inequitable uses of funds; brainstormed strategies for how tools and resources might be used in culturally-appropriate ways to better serve tribal Nations and Indigenous producers, landowners, communities and organizations; and participated in learning sessions and case studies on how tribal governments and communities have used cultural strategies to advance land stewardship.
- Provided research support, case studies, connections to community land trusts, historical perspectives on challenges and opportunities, and other information to Lincoln Institute of Land Policy regarding topic of why and how conservation land trusts might collaborate with community land trusts, with particular focus on community-based agriculture as a strategy to provide land for BIPOC food production and community-based markets rooted in the community land trust neighborhoods. Uplifted [Athens Land Trust](#) as a community land trust rooted in conservation and leveraging community-based agriculture to address food security, workforce development and other socio-economic needs. Provided additional support to several conservation land trusts on how to create and implement equitable partnerships with community land trusts, and to Center for Community Land Trust Innovation on advancing community-based agriculture in neighborhoods. The final working paper was entitled, “[Building Collaboration among Community Land Trusts Providing Affordable Housing and Conservation Land Trusts Protecting Land for Ecological Value.](#)”
- As McIntosh SEED provided outreach to landowners and farmers throughout Georgia the organization recognized in their assessments that many of the farmers were also cattle producers. These producers were not professionally connected to the beef industry, however, and did not implement herd management practices. To address this, McSEED met with the executive staff of the Georgia Cattlemen's Association on their policies and procedures for creating a chapter. McIntosh SEED also had to speak with the executive staff about certain members of the Georgia Cattlemen's Association's concern with “Black” being in the name of the chapter.

The South Georgia Black Cattlemen's Association (SGBCA) Chapter was created as a space where underserved cattlemen in South Georgia can be exposed to education and

available governmental resources, learn best practices and implementation methods, and work together to consolidate resources. The SGBCA is the 75th Chapter of the Georgia Cattlemen’s Association. McIntosh SEED presented to the Georgia Cattlemen’s Association the vision and importance of creating the chapter. The chapter was established (voted on and passed) during the GCA 60th annual convention in February 2022 with 15 members.

The SGBCA chapter’s inaugural meeting focused on topics that included farm loan options, reimbursements, and programs that were specific to cattlemen such as the livestock indemnity program and the livestock forage program. Georgia Cattlemen Association Executive Vice President, Dale Sadlin, addressed the policy advocacy branch of the Association and the importance of being aware of what is in the Farm Bill. The cattlemen were able to give insights on their experiences with local FSA and NRCS offices, as well as how the current policies affect their day-to-day living. The chapter has been able to do the following:

- Increased from 15 inaugural members in 8 counties to 42 current members in 15 different counties.
- Hosted 8 field days where farmers were able to convene and learn about different management practices.
- 22 cattlemen received their Beef Quality Assurance (BQA) certification, which allows them to get access to different markets.
- Cattlemen worked together and implemented controlled breeding so that they were able to sell a truckload of cattle.
- Multiple cattlemen began implementing herd management practices such as vaccination, weaning and deworming.
- McIntosh SEED was able to get herd management equipment (squeeze chute and head gate) to be used cooperatively to improve production operations.
- Some SGBCA members have used their property as demonstration sites to show fellow cattlemen land management practices such as winter and summer grazing, using electric fencing for rotational grazing, creep grazing, etc.

McIntosh SEED sponsored an outreach event at the Copeland Waters Living Farm in November 2021. This event provided information to neighboring landowners, farmers, and ranchers. They were exposed to information from Fort Valley State University concerning herd management. USDA provided information about its programs and resources to implement conservation practices. The farmers also learned about grazing practices and controlled breeding methods to build consistency and sustainability for the participating farms. The controlled breeding also allows the ranchers to have access to more markets.



The 2nd Annual event was held in October 2022 and included over 30 ranchers who were exposed to representatives from the Farm Services Agency, Natural Resources Conservation Services, the South Georgia Black Cattlemen’s Association Chapter, and different market opportunities.



Educate

- Prepared for and presented on Aspen Institute Thrive Rural webinars entitled, “What will it take for rural and tribal communities to make progress towards long-term resilience from natural disasters?” and “Stewardship + Equity.” Raised issues encountered by producers and landowners; and provided additional follow-up information to participants.
- Prepared for, presented information and led discussion on conservation tools and resources available to historically underserved producers and landowners at inaugural [Rural Food Forum](#) presented by The Eva Clayton Rural Food Institute and the Green Rural Redevelopment Organization. The event was held at the Vance-Granville Community College Civic Center on January 12, 2023 and was attended by over 120 BIPOC producers, community and faith groups and USDA officials.
- Prepared and presented a workshop on conservation easements to 45+ Black and Brown farmers at U.S. Congressman Don Davis’ office in Greenville, NC on June 26, 2023. Participated in community input session following the presentation, and shared suggestion that heirs property be included as an eligible transaction cost to be paid for out of federal funds on federal conservation easement programs.
- Participated in [Communities First](#) Southeast conference held in Durham, NC on November 14-15, 2023 and shared “lessons from the field” with agency officials, decision-makers and philanthropy leaders.
- Presented on conservation tools and resources at Operation Spring Plant’s January 13, 2024 conference held in Durham, NC. Led a discussion about conservation easements and how they work, answered numerous questions and provided additional follow-up information to participating producers and family members.

Workshops: *Hosting virtual and in-person workshops to build skills; transfer knowledge about heirs property, estate planning, wills, trusts and LLCs; and build a base of trust for additional follow-up support to individuals and families.*

- Developed and hosted a Web Soil Survey webinar for nonprofit and cooperative producers and landowners of color.
- Created and hosted a 2-part Heirs’ Property Workshop series. The 2-part series were held on different dates and included sessions on Heirs Property Basics and Estate Planning. Eighty-eight (88) participants joined each session. The sessions were led by Attorney

Mavis Gragg. Ms. Gragg prepared and presented two PowerPoints both on Heirs' Property Basics and Estate Planning. The participants were engaged and active throughout each session. Both sessions were recorded, and staff members shared the presentations with participants for future references.

- Hosted two (2) Heirs Property/Estate Planning Virtual Workshops titled Protecting the Family Home in partnership with Estate Planning Attorney Olivia Smith. Smith is an Estate Planning Attorney and co-founder of SR Law Group in Atlanta, Georgia. Attorney Smith has practiced law for 15 years and educated over 70 participants on what it means to have heirs' property and how to resolve any issues. Attorney Smith also discussed the importance of estate planning and getting a head start in the process.
- Hosted an Estate Planning and Heirs Property virtual follow-up Q&A Session in partnership with Attorney Olivia Smith. Smith conducted an heir's property session during the conference to educate landowners on heirs' property and the importance of planning ahead for generations to come. Over 100 participants registered for the webinar. McIntosh SEED plans to continue the education around heirs' property and estate planning next quarter.
- Conducted one (1) Landownership 201- Heirs Property workshop for 67 participants via Zoom. Estate Planning Attorney Mavis Gragg, presented.
- Hosted an outreach meeting in Ludowici, Georgia and presented to a family of 20 forested landowners. The meeting was requested by the family in hopes of assistance in taking the necessary steps to understand and manage their land sustainably. Landowner packages were prepared including NRCS "5 Steps to Assistance" resource tool, FSA farm number application information and McSEED's Landowner Glossary. Many of the attendees knew that they owned/ inherited land but had never seen the land before. After the meeting, the day consisted of site-visits to 4 properties in Long County.



One of the biggest disparities that many underserved farmers have is lack of access to different markets. Many of the farmers have used their farming experience to only sell in their local farmer's markets, at their local churches, or sometimes in local businesses. These agreements are usually not consistent or planned out annually. To address this, McIntosh SEED worked with multiple farms in preparation of getting them "market ready" by doing the following:

- Hosting 4 workshops at a farming cooperative discussing topics such as crop rotation, succession planning, food safety, Good Agricultural Practices (GAP), wholesale readiness, and bookkeeping.

- Presented at a farming cooperative concerning wholesale market access to fifteen (15) South Carolina farmers.
- Conducted a virtual food safety training collaborating with the Carolina Farm Stewardship Association for 14 farmers.
- Began the food safety plans for 5 farms.
- Worked with a farming cooperative to obtain their GAP certification in 2021 and their GLOBAL GAP certification in 2022.
- Presented at Fort Valley State University to underserved farmers concerning the steps to enter in different markets and obtain GAP certification.
- Worked with a wholesale distributor to increase the cold storage capacity for a farm in order to diversify the types of crops they are able to produce at wholesale volume.

McIntosh SEED also served as an intermediary, working with a farming cooperative to create a demand for their product. The organization contacted multiple businesses, restaurants, and organizations to advertise the products that the farming cooperative produced and created a once-a-week delivery route. McSEED created the orders, planned the logistics, negotiated pricing, and developed invoicing for the farming cooperative to sell to these organizations during their harvesting seasons.

The farming cooperative needed to acquire Good Agricultural Practices (GAP) certification in order to have access to additional markets. McSEED consulted with a food safety consultant in order to create a food safety plan and conduct a GAP audit. This allowed the farming cooperative to enter into broader markets and sell higher volumes of produce. The cooperative is now an aggregation point for additional farms to utilize their cold storage area and sell wholesale.

Matching/ In-Kind Activities

The Land Tenure Specialists also provided support to several initiatives that have benefited or could benefit Southern producers, landowners, stewards and communities, but the initiatives were carried out in other regions and/ or were supported by non-SARE funding. These activities and accomplishments are described below and accounted for as In-Kind Contributions.

Landowner 101 and 201 Models: The workshops hosted by Resourceful Communities and McSEED provided each participant with a landowner packet that included all information on their property that is publicly available, including deeds, tax cards, soil maps, aerial maps, floodplain maps, wetlands maps, and more. Workshop agendas included walking your land, interpreting the documents in your landowner packet, and the sessions were very interactive, with Peg Kohring Cichon responding to questions, raising issues about individual property issues, and more. Over 200 landowners participated in the workshops, and many have since requested technical assistance and support in addressing property issue. (*See Attachment H*)

Philanthropic Model: Assisted Doris Duke Foundation’s Environment Program team in developing concept for \$32mm Indigenous-Led Conservation Initiative [announced](#) as part of the Tribal National Conservation Pledge at the White House on March 21, 2023. The five-year allocation helped to leverage an additional \$70.5mm from the Biodiversity Funders Group, Native Americans in Philanthropy and 14 other partner philanthropic entities.

Indigenous Conservation Transaction Model: Provided technical assistance and helped Ramapo Munsee Land Alliance secure \$224,000 in funding from Doris Duke Foundation to rematriate a 54-acre property of great cultural and spiritual significance, including the largest native stone monument east of the Mississippi. Also helped the Ramapough Lenape Nation secure \$10,000 in funding from Seventh Generation Fund to equip the tribal community center for use as a COVID vaccination site and to support Sister Circles, a program and support network for female tribal members to reconnect with their culture and with each other. Also helped [Native Roots Farm Foundation](#) with negotiation strategy support for a potential farmland acquisition.

Indigenous TEK Youth Stewardship Program Model: Helped the newly-established Native land trust, Ramapo Munsee Land Alliance, with project planning and grantwriting support to submit a \$997,284 grant request for support of a Tribal Youth Stewardship Corps that would document oral histories of lands and landscapes significant to the Ramapo; develop and implement culturally-driven stewardship plans for the properties; and develop and implement cultural tourism efforts for tribal members and the general public. (The project was not funded but will be submitted to other potential funders in the future.)