

TOWARDS COMMUNITY-OWNED FORESTS:
LANDOWNER PERSPECTIVES ON THE
BLACKFOOT COMMUNITY CONSERVATION AREA

By

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Towards Community-Owned forests: Landowner perspectives on the Blackfoot Community Conservation Area

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The Blackfoot Community Project is a partnership among the Blackfoot Challenge, a landowner-based watershed organization in the Blackfoot Valley and The Nature Conservancy to purchase and re-sell up to 88,092 acres of mid-elevation Plum Creek Timber Company lands to private and public interests as an alternative to subdivision and fragmentation of the landscape. In line with the project's goal to maintain the working landscapes of the Blackfoot Valley and rural lifestyle through a "community-driven" process, the partnership has proposed to set aside 5,600 acres of these former timberlands to create the Blackfoot Community Conservation Area (BCCA), an innovative institutional arrangement involving community-ownership. This study is a participatory research project to provide systematic information on questions raised by project leaders concerning the future ownership and management of the BCCA. Its main methods include ongoing participant observation and a mail survey to adjacent landowners of the proposed BCCA to document their priorities and perspectives related to BCCA ownership, management and use. The majority of landowners in the study either supported "community ownership" through the Blackfoot Challenge or raised concerns and asked for more information before making a decision. There was strong support for managing the BCCA for a variety of purposes to meet ecological and social benefits including wildlife habitat, weed management, wetlands/riparian areas, public access, recreation, rangelands/grazing and timber. The thesis emphasizes the importance of developing a BCCA management plan and process that considers all expressed views, though it recognizes the necessity of tradeoffs especially given many value differences between new and generational landowners, especially with regard to the issue of motorized recreational use.

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Table of Contents

Abstract.....	ii
Acknowledgements	iii
Table of Contents	iv
List of Tables & Figures	v
Chapter 1: Introduction	1
Chapter 2: Project Setting	5
The Landscape: The Blackfoot River Valley	5
The Watershed Group the Blackfoot Challenge	7
Large-Scale Land Acquisition & Conservation	8
The Blackfoot Community Conservation Area	18
Conclusion	19
Chapter 3: Literature Review	20
Traditional Resource Management in the 20 th Century & Its Limitations	20
Land Acquisition as a Conservation Strategy	25
The Changing Character of the American West	27
Community-Owned Forests: A Realignment of People & Forests?	30
Summary of Themes	34
Chapter 4: Methodology	35
Research Purpose	35
Participatory Research Approach	36
Methods	37
Potential Implications	43
Chapter 5: Landowner Perspectives on the Blackfoot Community Conservation Area	46
Community-Ownership and Management: Five Pressure Points for Landowners.....	47
Ecological Services and Community Benefits	47
Public Access and Recreation	50
Contributing to the Local Economy	54
Governance: Long-term Ownership and Management	55
Defining the Who and What in Rural Community and Lifestyle	62
Making Meaning of the Results	67

Chapter 6: Reflections and Recommendations	70
Considerations for the Blackfoot “Community”	71
Beyond the Blackfoot	79
References Cited	82
Appendix A – Survey Questions	88
Appendix B – Blackfoot Community Project Map	89
Appendix C – Blackfoot Community Conservation Area Map	90

List of Tables and Figures

Table 1: Blackfoot Community Project Timeline of Events	15
Table 2: Principles and Indicators of Collaborative Conservation Initiatives	23
Table 3: Profile of Surveys Mailed Based on Zipcodes	40
Table 4: Land Values and Uses (Means)	48
Table 5: Recreation Uses (Percent)	50
Table 6: Recreation Uses (Means)	51
Figure 1: Should the Blackfoot Challenge Become the Legal Owners of the Proposed Blackfoot Community Conservation Area? (Percent)	56
Figure 2: Defining the “Community”: Who Should the Blackfoot Community Conservation Area be Managed by and for? (Percent)	65

CHAPTER 1: INTRODUCTION

West of the hundredth meridian, the working landscapes of the past are becoming the future for an increasing number of ex-urban migrants seeking rural communities with local charm, natural amenities and restructured rural economies. A growing body of research discusses the increasing wave of ex-urban migrants to the American West, and their consequent impacts to social and physical environments (Power, 1996; Riebsame et al. 1997; Rasker, 2001; Nelson, 2001; Wilson, 2006).

One response to rural restructuring of the West has been the reaction of local communities seeking to take a lead in conserving working landscapes and communities. The rise of community-based conservation, one type of collaborative conservation, represents to some “a pioneer movement” in natural resource management (Wondelleck and Yaffee, 2000). Its proliferation, in part, reflects declining trust in the federal U.S. government and top-down “command and control” decisions related to natural resources. Community-based conservation emphasizes instead participation of local residents and communities working to maintain or restore sustainable social and ecological communities, inclusion of disempowered voices, and voluntary conservation rather than compliance by regulation (Snow, 2001).

In this thesis, I seek to advance the study of community-based and collaborative approaches to conservation by addressing one of the newest institutional arrangements in the American West--private community-owned forests. Restructuring in the international forest industry has led private timber companies to rethink their portfolios and for many to divest lands with high value for residential development. In response, local communities are seeking alternatives to forest conversion and residential sub-division of these former timberlands (Belsky, under review). These communities seek to maintain working landscapes that provide connectivity across ecosystems at a landscape or watershed-level, and continuation of public access for a variety of recreation and livelihood activities. A successful transaction involving the purchase of corporate timber lands has recently occurred in the Blackfoot Valley in western Montana, led by a partnership among the local watershed conservation organization known as the Blackfoot Challenge, the global land trust The Nature Conservancy and Plum Creek Timber Company. Under the term the “Blackfoot

Community Project,” the partnership has sought to, and has been successful in, purchasing 88,092 acres of former corporate timberlands.

With acquisition of former timberlands, the Blackfoot Community Project now faces the challenge of solidifying future public and private ownership and management. A key strategy of this effort from its inception is to be “community-driven.” As such, organizers of the partnership have pursued a variety of means to seek public input and identify community goals. One objective that has arisen through the course of these negotiations, is the idea to designate a portion of the acquired timberlands for the creation of a community conservation area. These discussions have led to the proposal to create the Blackfoot Community Conservation Area, or herein BCCA.

Located at the southern end of the Crown of the Continent Divide Ecosystem, the proposed BCCA is a 5,600-acre parcel that has historically provided critical biological habitat, linkage to national forest lands and important community values for public access and rural livelihood. What individual or entity will own the BCCA? Will it be private or public in nature? Who will develop and implement a management plan for the BCCA? Given the project’s mandate to be “community-driven,” who is the “community” for whom the BCCA is to be owned and managed, and how shall its interests be represented? This thesis is an effort to respond to the questions raised for developing a community-driven ownership structure and management plan for the BCCA. It is important to note that the questions that drive this thesis come from the concerns of the Blackfoot project partners themselves, and their desire for me to assist them with systematically collecting information that will help to move towards answering these questions. My relationship with the Blackfoot Valley began eleven years ago as a resident on a guest ranch that has been in operation since the late 1920s. Currently, I am a part-time landowner and community member. While researching and writing the thesis, I have also been an independent contractor for the Blackfoot Challenge, providing support on a number of programs including Conservation Strategies and the BCCA project, Education and Outreach, and Weed Management. Thus, as will be explained in more detail below, this thesis represents a participatory research project by any definition of the term.

With this background in mind, the specific objectives of the thesis are the following:

1. To provide an accurate description of the origins and preliminary planning stages of the Blackfoot Community Project, particularly the idea and efforts to create the Blackfoot Community Conservation Area (BCCA);
2. To provide systematically collected information on local concerns to contribute to the goal of the BCCA project to be “community-driven.”
- 3 To provide recommendations for the ownership and management of the future BCCA according to “community-driven” goals and concerns.

The findings presented provide a first-hand look at a variety of issues. These include conducting a participatory research project itself, the complexities involved in defining and studying “community” within the context of a watershed-level project (i.e., with multiple towns and communities), logistics and ultimate trade offs to collecting in depth, qualitative information from a large number of community members and interpretation of these results with the precision from quantitative methods; how to balance the concerns of the Blackfoot “participants” with those in academic research, and ultimately, how and who shall make decisions regarding the necessary trade offs among different land use and management options? This last question pushes the volatile but critically important question of whose rural lifestyle is to be protected in the BCCA?

The thesis is organized in the following way. In chapter two, I discuss the ecological and social aspects of the project setting by locating the study in the Blackfoot Valley of western Montana, describing the history and conservation philosophy of the local watershed organization, the Blackfoot Challenge, and by providing an overview of the Blackfoot Community Project, which is the larger land acquisition and conservation effort that has paved the way for the BCCA.

Chapter 3 provides a literature review and a theoretical background to the thesis by exploring the evolution of traditional resource management to grassroots collaborative conservation, some of the implications related to land acquisition as a conservation strategy, the changing character of the American west and the development of community-owned forests as a newer institutional arrangement in response to corporate timberland divestment.

Following the literature review, Chapter 4 provides the research methodology which integrates quantitative and qualitative social science techniques within a participatory research framework.

Next, in Chapter 5, I present the results from the survey on BCCA adjacent landowner perspectives and on-going participant observation.

The thesis concludes with Chapter 6 where I offer reflections and recommendations about the process of moving towards a community-owned forest in the Blackfoot watershed, with implications for other communities and efforts beyond.

CHAPTER 2: PROJECT SETTING

The concept of developing a community-owned forest in the Blackfoot Valley of western Montana originated from a larger community-based conservation effort, known as the Blackfoot Community Project. As a partnership effort between the Blackfoot Challenge and The Nature Conservancy, the Blackfoot Community Project involves the purchase of approximately 88,092 acres of mid-elevation corporate timberlands owned by Plum Creek Timber Company from the headwaters of the Blackfoot River to the Clearwater drainage. The lands will be re-sold by The Nature Conservancy to public and private interests according to a community-driven plan. This chapter provides an historical account of landowner-based conservation in the Blackfoot Valley, with reasons for, and key steps in, developing the local watershed organization, the Blackfoot Challenge. Next, the chapter provides an overview of the Blackfoot Community Project and timeline of events with a segway into the Blackfoot Community Conservation Area (BCCA)—providing an important biological and social setting for the thesis.

The Landscape: The Blackfoot River Valley

The 1.5 million-acre (2,400 square miles) Blackfoot watershed in western Montana is comprised of a diverse and ecologically rich combination of habitats due to its geologic and hydrologic features. Located at the southern edge of the Crown of the Continent Ecosystem, the Blackfoot is part of a ten million acre ecosystem that extends north to Canada. As a sub-basin of the Columbia River, the Blackfoot River flows a 132-mile course from its headwaters on the Continental Divide to the Clark Fork River, just east of Missoula, a growing urban center. Four main tributaries and numerous creeks flow into the river with diverse and complex connections to wilderness areas, national forests and private ranchlands in valley bottoms. Prairie grasslands, sagebrush steppe, coniferous forest, and extensive wetland and riparian areas characterize the internal reaches of the watershed. Over eighty percent of the watershed is covered with mixed species forests, with the remaining lands in agriculture, grasslands, wetlands and streams (BC, 2005).

Nationally-recognized for its native trout fishery, the Blackfoot watershed is home to a number of wildlife species, including grizzly and black bears, wolves, elk, deer, mountain lion, and lynx. Glaciated wetlands dot the landscape with lakes and ponds, bogs and fens, spring creeks, riparian swamps and cottonwood forests attracting many species of breeding and migratory birds.

The social composition of the watershed is also diverse. The Blackfoot spans three separate counties—Lewis and Clark, Powell and Missoula County—and is comprised of seven distinct communities, 3,002 households, and approximately 8,096 year-round residents. The population remains rural and dispersed with concentrations of less than 300 people per square mile in Seeley Lake, Lincoln and Potomac/Bonner areas (BC, 2005). Much of the population increase is related to in-migration from other states—between 8 and 18% of the current residents of the Blackfoot resided out of state in 1995; the population is also older than other areas in Montana and across the nation, due to in-migration by retirees (BC, 2005a).

Land ownership is characterized as 57% public (855,000 acres), 27% private (405,000 acres), and 16% (240,000 acres) Plum Creek Timber Company (BC, 2006). In this watershed, ranchers, miners, loggers, and outfitters have depended on the natural resources for their livelihood. Recognizing this strong tie between land and livelihood, landowners have played a key role in conservation projects for over three decades. One of the earliest efforts involved the development of Montana's enabling legislation for conservation easements with the first conservation easement signed in the Blackfoot Valley in 1976.

The next milestone for conservation in the Blackfoot watershed was in 1992 when the Blackfoot River was listed as one of the ten most endangered rivers in the United States due to a century of unsustainable practices including mining, livestock grazing, and timber harvest. Such practices were impacting the water quality and fisheries of the Blackfoot generating interest in river management and enforcement via top-down, agency-led planning and decision-making. Housing development, increased recreational use, and the spread of noxious weeds were also beginning to pose additional impacts on the overall health of the river. A few key landowners responded with a non-regulatory approach to conservation on the Blackfoot River by developing a recreation corridor and an innovative walk-in hunter program on private lands (TNC/BC, 2004), demonstrating the effectiveness of community-

based conservation and creative solutions that meet public and private management objectives.

The Watershed Group: The Blackfoot Challenge

As resource threats continued to increase, landowners in the Greenough and Ovando areas began discussing the formation of a watershed group that would focus beyond the river from “ridge to ridge” on conserving the valley’s natural resources (BC, 2006). In a collaborative approach to conservation, the group would focus on bringing all the interests to the table, building consensus and developing win-win solutions for the resources and communities in the Blackfoot watershed. In 1991, local leaders arranged meetings in area communities to explore what values needed protection and link common interests. Each of the communities in the Blackfoot, including Lincoln, Ovando, Helmville, Seeley Lake, and Potomac, voiced an interest in preserving the natural resources and rural character of the watershed.

With this local input, in 1993, the small group of landowners moved forward to form the Blackfoot Challenge as a 501c3 non-profit watershed group to enhance, conserve, and protect the natural resources and rural lifestyle of the Blackfoot River Valley for present and future generations. The “challenge” that faced them was to meet the above mission with the diversity of ownerships, habitats and communities in the watershed.

With an operating area covering the entire 1.5 million-acre watershed, the landowner-based organization serves as a communication pipeline for stakeholders, a place for discussion and collaboration, cooperation on natural resource management and stewardship, and a way to build private and public partnerships and to avoid conflict (BC, 2000). Rather than take positions on issues, the organization promotes a non-advocacy based approach to watershed conservation to help represent and respond to the widespread interests in the valley.

The Blackfoot Challenge Board is comprised of ten to eighteen members representing various businesses, farms and ranches, communities and residents, as well as the county, state and federal agencies residing and/or operating in the Blackfoot Valley. This equates to private landowners from various communities, agency representatives (US Fish and Wildlife Service, the US Forest Service, Lolo and Helena National Forests, Montana Fish, Wildlife

and Parks, the Department of Natural Resources and Conservation), a major corporate timber company (Plum Creek Timber Company), and business owners. At board and committee meetings, the main goal is to share information and work towards consensus on major issues that affect the watershed including developing conservation strategies, drought and water conservation, habitat and water quality restoration, weed education and management, wildlife management, forestry and fire, and education and outreach.

The list of Blackfoot Challenge accomplishments with their partners includes over 90,000 acres of private lands under perpetual conservation easements leading the way in all other watersheds across Montana (Clark Fork Coalition, 2005), 12 landowner-led Weed Management Areas practicing integrated weed management on over 160,000 acres, 2 TMDL (Total Maximum Daily Load) EPA-approved plans completed, 39 streams restored including 38 miles of instream restoration and 62 miles of riparian restoration, 2,600 acres of wetland restoration and 2,300 acres of native grassland restoration, 75 key irrigators and recreational outfitters voluntarily participating in emergency drought efforts, a 50% reduction in human-grizzly bear conflicts, and over 500 landowners, residents, and conservation partners actively involved in programs (such as committees, work groups, public meetings, tours, workshops and stewardship projects). The organization is recognized nationally as a model for collaborative conservation (Helena Business Wire, 2005). The subject of the following section, the Blackfoot Community Project, is a product of this history of landowner- and community-driven conservation.

Large-Scale Land Acquisition and Conservation

Growing concern by leaders within the Blackfoot Challenge over the possible biological, agricultural and community fragmentation of the landscape due to subdivision caused them to take a proactive role in protecting its future. With most of the private land in the Blackfoot comprised of large working ranches, both landowners and public land managers were interested in keeping the ranches economically viable and intact and avoiding the cumulative impacts of subdivision and sprawl already occurring in other Montana watersheds.

In 2000, the Blackfoot Challenge formed the Conservation Strategies Committee to coordinate and cooperate in land conservation and stewardship efforts (through conservation

easements and fee title acquisition) between public agencies, conservation groups, and private landowners. According to Greg Neudecker (2004), Chair of the Conservation Strategies Committee, “We needed a working group involving the people on the ground (in contrast to board members), a better mechanism to share information.” Due to the intact nature of the Blackfoot landscape, many conservation organizations and agencies had separately prioritized land conservation, stream restoration, and resource stewardship activities. However, according to Neudecker (2004), no one knew what the other person was doing or who they were working with in terms of landowners. By meeting quarterly, the committee established a forum for sharing information and collaborating on conservation and stewardship projects.

The Conservation Strategies Committee’s first project involved creating a watershed map that characterized ownership and conservation easement lands. Shortly thereafter, they examined where various conservation organizations and agencies were working and with whom, and most importantly defined potential gaps. Plum Creek Timber Company lands represented the greatest percentage of lands with the least conservation attention; at the time, the corporate company owned 20% of the mid-elevation lands in the watershed, key linkages between higher elevation public lands and lower private valley bottoms. Specifically, the Tupper Lakes region, Ovando Mountain and Alice Creek areas were pinpointed as extremely important natural resource areas with high wetland, riparian, and linkage values.

With public and private conservation partners at the table pooling their expertise and resources, timing was the final ingredient which made the Blackfoot Community a reality, specifically Plum Creek Timber Company’s interest to sell non-strategic timberlands in the watershed, an interest that is rooted in a much larger forest industry trend.

Over the past twenty years, forest product companies have shifted away from raw material production to the much more profitable divestment of timberlands. One estimate states that fifteen million acres changed ownership between 1998 and 2002 alone (Ingerson, 2002 in Belsky, 2005). Looking ahead to the future, one forest policy institute forecasts that millions of acres are expected to be transferred out of industry ownership in the next decade (Pinchot Institute, 2004). A number of factors are driving the national trend in divestiture including moving capital away from less productive timberlands into lower-cost, higher productivity timberlands in other areas of the United States or out of timber completely, with

the key force linked to financial performance of the forest products industry and the need to restructure to improve profits (Belsky, 2005). The outlying result has been the sale of timberlands to Timber Investment Management Organizations (TIMOs) and to real estate companies.

Plum Creek Timber Company is the largest owner of private working forests in the country (Stein, 2005 in Belsky, 2005). The company owns approximately 7.8 million acres of timberlands in the United States and 1,301,000 acres in Montana leading all other states. In their annual report (2004), Plum Creek stated that it is procedure to regularly review their timberland portfolio, identify properties that are no longer strategic to their long-term operations or that may have higher or better uses other than commercial timberlands. Over the next 15 years, the company has expressed an interest in selling so-called higher and better use lands for conservation, residential or recreational purposes (PCTC, 2004; PCTC, 2005). The macro scale issues of free market enterprise and competition, corporate identity and culture and land ownership rights and values have had more sizeable ramifications on timberland sales in the west.

Plum Creek timberlands are viewed by the real estate industry as highly valuable for development especially for second home buyers, possibly leading to the fragmentation of the valley's intact nature. These timberlands have played a critical role not only in providing ecological values and connectivity, but also in creating job and recreation opportunities since the early 1900's. Local residents use the lands for hunting, fishing, and firewood gathering and have viewed Plum Creek lands as "open" for public use, or "de facto" public lands (Goetz in Hartmann, 2004). As early as 1996, representatives from Plum Creek attended a community meeting in the Swan Valley (north of the Blackfoot Valley) and publicly announced their interest in selling and exchanging timberlands in the area. "The company has identified 34 areas totaling 150,000 acres that will be offered for sale or studied for possible exchange," quoted the local Seeley-Swan paper (Vernon, 1996). Those sales occurring in the neighboring Swan Valley coupled with the national trends in divestiture sent a clear message to landowners in the Blackfoot that they needed to take a proactive role in guiding the future of Plum Creek lands in the watershed. According to Jim Stone, Rancher and Chair of the Blackfoot Challenge, too much was at stake economically, ecologically, and

socially to let the lands be sold on the open market without any resident input or conservation planning (Hartmann, 2004).

The threat of timberland divestiture in the Blackfoot led partners within the Blackfoot Challenge and The Nature Conservancy to convene a meeting in early 2002 with Plum Creek Timber Company to discuss purchase of 4,500 acres in the Tupper Lakes area, one of the key parcels identified by the Conservation Strategies Committee in need of protection. Plum Creek responded positively and voiced their interest in selling nearly 100,000 acres total from the headwaters of the Blackfoot to the Clearwater drainage due to lower timber volumes, the distance of these lands from the mill (later reduced to 88,092 acres due to Plum Creek interests), and lower real estate value, making a conservation alternative viable.

This private discussion set the stage for a tri-fold partnership among the Blackfoot Challenge, The Nature Conservancy and Plum Creek Timber Company to implement the Blackfoot Community Project. The Blackfoot Challenge would provide the link to the community and local on-the-ground management while the globally recognized Nature Conservancy would provide the financial backing, infrastructure and legal expertise to broker the land acquisition. The terms of the land sale were finalized in October 2003. The agreement included purchase of 88,092 acres from the headwaters of the Blackfoot to the Clearwater in two separate phases between 2004 and 2007 (TNC/BC, 2004). The agreement legally defines two project phases. The first phase involved three fee acquisitions or land purchases in January, May and August of 2004 for a total 42,927 acres, while the second phase involves three options between 2005 and 2007 for a total 45,166 acres, pending the success of the initial acquisition and disposition phase. (For more information on the project, see www.blackfootchallenge.org.)

A Model for Community-Based Planning

As a community-based conservation project, landowners and residents from the headwaters of the Blackfoot to the Clearwater drainage have participated directly in the project in the form of committees, work groups, public meetings, one-on-one discussions and surveys. This public participation began in December 2002, nearly nine months prior to the signed agreement between The Nature Conservancy and Plum Creek Timber Company, when the Blackfoot Challenge hosted a community meeting in Ovando seeking landowner

feedback and support to move forward with the project. Roughly 130 people attended and a significant number expressed their support. Local rancher and Powell County Commissioner, Tom Hatch, stated “I see the land sale as being very beneficial because local landowners will be given the opportunity to acquire some of the land, which will increase the economic well-being of the local ranchers.” (Hatch cited in TNC/BC, 2004).

The Blackfoot Challenge continued to engage the community by hosting follow-up meetings in all communities with lands scheduled for purchase by The Nature Conservancy including Ovando, Greenough, Seeley Lake, Helmville and Lincoln between February and May 2003, and developed a list of community preferences for re-sale of project lands. At each meeting, landowners and community members were given background to the project, an overview of the lands proposed for purchase and most importantly were asked to comment on a variety of issues (including grazing leases, timber management, public access, natural resources, development, cooperative management, and private versus public ownership).

Specific questions focused on who held existing grazing leases, how important they are to the land, does each community support grazing lessees as being given top priority for future leasing and/or ownership for continued grazing management. A similar set of questions was asked related timber, access, private versus public ownership, and what if any areas would the community want to see left unencumbered for future growth. Following this discussion, participants were asked whether they preferred to see the Plum Creek lands in their community re-sold to private landowners or public agencies and they were given the chance to identify parcels of interest on the map for individual purchase. Following these meetings, the minutes were distributed to Blackfoot landowners and partners across the valley giving further opportunity to comment on the acquisition and re-sale of project lands.

Using this information, a Disposition Plan was crafted to guide re-sale of project lands. The document developed a disposition process, with important principles to establish equitable decision-making procedures, including: 1) maintaining the rural/agricultural lifestyle, 2) assuring permanent protection for the natural resources, 3) maintaining the integrity of the watershed as a large, intact landscape, 4) maintaining lands as productive working forests, 5) ensuring sustainability, the support of smaller mills and operators, 6) encouraging management activities to maintain or restore the biological health of the land, 7) maintaining grazing use, 8) assuring continued public access and recreational use of the lands

historically available to the public, and 9) creating an endowment to assure future revenue from property taxes on project lands at least equal to current revenue to counties involved (BC, 2003). The plan also includes a “list of preferences” for re-sale of project lands to private landowners with the stipulation that the preferences would not be used to “rank” potential buyers but instead guide the process of selection. The list of preferences included:

1. An adjacent landowner.
2. A valley resident.
3. An existing grazing lessee.
4. Willing to maintain traditional uses of the land, including grazing leases, and willing to maintain or improve public access where the community has identified access as a priority.
5. Willing to place a conservation easement on their property as part of the transaction.
6. Willing to accept a conservation easement on the Plum Creek Timber Company parcel.
7. Willing or able to buy a large amount of acreage. Parcels will be sold in as large a size as possible to minimize fragmentation and to maintain intact landscapes. Requests to purchase small acreage will be considered on a case-by-case basis. How well the proposed purchase fits with ownership patterns and the landscape will be the major determining factor for favorable consideration.
8. Interested in consolidating boundary lines or ownership with the Plum Creek Timber Company parcel.
9. Willing to sign a voluntary agreement to undertake proactive land stewardship activities and participate in the Blackfoot Challenge Stewardship Program.

A Disposition work group was formed with private community leaders, public agency representatives and non-profit conservation groups to meet quarterly and facilitate the disposition process.

The Nature Conservancy will not retain ownership of any of the parcels involved in the project, but instead plans to re-sell the lands in as timely a fashion as possible to recover their investment. Private landowners will receive priority over public agencies for purchase of specific parcels; however, under certain situations, preferential sale to public agencies would be considered for the following reasons: preservation of community values, consolidation of public ownership patterns and management, maintenance of rural lifestyle (which wasn't defined at the time the document was developed) (BC, 2003).

Based on the disposition plan, 70% of Blackfoot Community Project land will be sold to public agencies and 30% to private landowners. Conservation easements will be used by

various land trusts and agencies operating in the Blackfoot Valley to protect the natural resource values of the private parcels for perpetuity. By eliminating or reducing the development potential of these parcels, the fair market value will be substantially reduced making it more feasible for long-time ranchers and residents to purchase the parcels. Landowners will work with land trust and agency partners to individually craft the conservation easements in accordance with the each specific parcel and the family's values and uses related to the land, in an effort to maintain traditional uses such as timber harvest, grazing and recreation. The public agency lands purchased by federal funds will remain in public ownership and by law, will never be transferred or re-sold back to private ownership.

The Blackfoot Challenge and The Nature Conservancy refer to the Disposition plan as a community-driven and guided process, based on the public meetings and efforts to engage the community in the project. In a further commitment to community, Hank Goetz, a long-term resident and trusted leader within the community, was selected and contracted by the Blackfoot Challenge Board of Directors to serve as the Blackfoot Lands Director, responsible for managing the Blackfoot Community Project, facilitating negotiations, answering questions, and providing outreach.

Project Implementation

The goal of the Blackfoot Community Project is to preserve the natural resources, diversity and rural character of the Blackfoot, preventing further fragmentation and development (TNC/BC, 2004). In just two short years, the partnership between the Blackfoot Challenge and The Nature Conservancy, with pivotal support and involvement by landowners in the Ovando and Helmville communities, has been key in facilitating this landscape-level effort. With a total acquisition cost of nearly \$68 million, the capital and non-fiduciary investment has been substantial.

At the time of this thesis, The Nature Conservancy has purchased 54,103 acres of the original 88,092-acre total. They have re-sold 24,617 acres (24,457 to public agencies; 160 acres to private buyers). Both partners, the Blackfoot Challenge and The Nature Conservancy, hope to acquire the lands and re-sell them using an "open and transparent process," following their organizational missions and the needs and preferences of the Blackfoot watershed community. Table 1 outlines key steps and events that have taken place to date.

Table 1. Blackfoot Community Project Timeline of Events

Date	Event
2000	Conservation Strategies Committee forms to strategize on landscape-level conservation activities through pooling resources and funding.
2001	Watershed map developed; Plum Creek Timber Company (PCTC) lands identified as key target for conservation.
2002	<p>\$1 million NAWCA (North American Wetlands Act) grant written and funded; meeting with PCTC pertaining to parcels in Tupper Lakes Area; PCTC and The Nature Conservancy (TNC) begin negotiations for sale of 88,092 acres from Lincoln to Seeley Lake.</p> <p>Community meeting held in Ovando to inform landowners of project and acquire their support, with regard to 1) acquisition by TNC of 88,092 acres of PCTC lands and 2) development of a disposition and management plan coordinated by the Blackfoot Challenge; 400 adjacent landowners invited to the meeting; 130 attend. (December 12, 2002). Follow-up mailing with questionnaire to same list of Blackfoot residents and landowners to ask same questions and monitor responses (December 20, 2002).</p>
2003	<p>Blackfoot Challenge and TNC acquire formal approval by community based on the meeting and questionnaire to move forward with the project. TNC meets with PCTC to make an offer (January 2003).</p> <p>Mailing to community members to update them regarding the project with a copy of the questionnaire responses (February 13, 2003).</p> <p>Subsequent meetings held in each community, including Ovando, Lincoln, Greenough, Seeley Lake, and Helmsville, to develop local preferences and priorities for future land ownership and management (February – May 2003).</p> <p>Meeting between TNC and Blackfoot Challenge to organize workgroups to develop the project and coordinate an MOU between both organizations. Workgroups created including: Project Implementation Group, Community Leaders, Disposition, Land Management, Fundraising, Government Relations, and Press Relations (May 15, 2003).</p> <p>Land & Water Conservation Funding \$5 million proposal sent to Senator Burns (June 15, 2003).</p> <p>MOU signed between TNC and Blackfoot Challenge (September 2003). Agreement signed between TNC and PCTC for acquisition of 88,093 acres (October 9, 2003).</p> <p>The project receives \$5 million LWCF; \$2 million for conservation easements acquired by the USFWS and \$3 million for land acquisition by the BLM (November 2003).</p>
2004	<p>Fee 1 lands purchased – total 18,443 acres (January 29, 2004)</p> <p>The Nature Conservancy sells 3,834 acres on the Blackfoot Clearwater Game Range to Rocky Mountain Elk Foundation, who will hold title to the land until MT Fish Wildlife and Parks is able to purchase the land with Forest Legacy Funds (May 2004).</p> <p>Fee 2 lands purchased – total 19,883 acres (June 2004).</p> <p>Fee 3 lands purchased – total 4,600 acres (September 2004).</p> <p>Community Meeting held in Ovando to acquire community input on the Blackfoot Community Conservation Area (September 15, 2004).</p>

Table 1 Continued. Blackfoot Community Project Timeline of Events	
2004	Blackfoot Community Conservation Area Survey distributed to local landowners and residents to acquire preferences on land values and uses, Blackfoot Challenge ownership, long-term management, and community involvement (October 2004).
	MT Fish, Wildlife and Parks purchase 3,834 acres on the Blackfoot Clearwater Game Range from RMEF. The land will be managed as part of the WMA (October 2004).
	The project receives \$18.3 million, the largest appropriation nationally that year and in the history of The Nature Conservancy's requests (November 2004).
2005	Project lands begin to be re-sold to private individuals and public agencies based on the Disposition Plan; 2500 acres sold to BLM in Tupper Lakes and Marcum Mtn. areas.
	The project receives \$18.3 million, \$15 million in LWCF, including \$10 million for land acquisition by USFS and \$5 million for land acquisition by BLM, and \$3.3 million in Forest Legacy Funds for MT Fish, Wildlife and Parks to purchase the Game Range inholdings.
	Conservation easements are purchased on just over 10,000 acres of project land in the Ovando Mountain and Tupper Lake areas using Land and Water Conservation Funding.
	Forest Legacy-HCP \$1.4 million proposal included in the President's FY06 budget for conservation easements in Nevada Creek.
	A private fundraising campaign begins with the goal to raise \$10 million for the purchase and management of the Blackfoot Community Conservation Area, payment to cover county taxes, acquisition of conservation easements, and project management.
	Planning begins for the Blackfoot Community Conservation Area. Council Members for the BCCA selected and appointed by the Blackfoot Challenge Board of Directors (July 2005). First BCCA Council Meeting (August 2005).
	Conrad Burns visits the Blackfoot (August 2005).
	BLM purchases 5489.39 acres in Marcum Mtn./Tupper Lakes (September 2005).
2006	President's FY06 budget includes \$6 million for Forest Service acquisition and \$1.4 million for conservation easements by MT Fish, Wildlife and Parks; FY07 request includes \$5 million for BLM acquisitions and \$2 million for USFS acquisitions.
	USFS purchases from TNC 11,000 acres in Alice Creek, Marcum Mountain/Tupper Lake, Ovando Mountain, Bear Creek, and Monture Creek (March 2006).
	USFS purchases 3,800 acres in Horseshoe Hills, completing LWCF allocation to date (September 2006).
	Secretary of the Interior Dirk Kempthorne visits the Blackfoot (October 2006).
	Project receives \$2.699 million in HCP funding for conservation easements in the Lincoln area.
	Private Fundraising Campaign reaches \$7.5 million, or 75% of the goal (November 2006).
	TNC Board of Governors votes to approve Option 2 purchase (November 2006).

Legislative Requests and Private Fundraising

Given that two-thirds of the Blackfoot Community project lands will be transferred to public agencies and the high cost of these lands to purchase, the Blackfoot Challenge and The Nature Conservancy project partners have worked closely with the Montana delegation—Senator Conrad Burns, Senator Max Baucus and Representative Denny Rehberg—to acquire federal and state support and funding. Throughout the BCP project, landowners and project partners have personally corresponded with these individuals through phone calls, taking delegates on field trips in the Blackfoot Valley, and trips to Washington, D.C. Jim Stone, Chair of the Blackfoot Challenge, recalls a visit from Senator Conrad Burns to the Blackfoot in 2002:

The Senator sat looking north at the community conservation area and explained his position about more public lands and the need to keep sustainable agriculture in the valley. Our group explained that this was a community process and we are comfortable with the diverse ownership and have worked together for a number of years. Senator Burns remembered buying calves in the Helmville Valley years before, told great stories about his ranching history, but before he left said, “If it’s homegrown, I’ll support it” (Stone 2002 cited in BC, 2004).

To date, approximately \$33.7 million of Land and Water Conservation Funds, Forest Legacy, and Habitat Conservation Plan funds (Department of Interior’s Cooperative Endangered Species Conservation Fund) have been received. One of those requests, namely the \$18.3 million appropriation from Congress in November 2004, was the largest appropriation nationally that year and the largest appropriation in the history of The Nature Conservancy’s requests. In combination with the request for public funding, Blackfoot Community Project partners initiated a \$10 million fundraising campaign in 2005.

In addition to federal funding and a private fundraising campaign, the balance of the purchase will be acquired through sale of the project lands to private buyers. In accordance with their non-profit status, The Nature Conservancy is required to sell the Blackfoot Community Project lands at fair market value to private parties. Consequently, all project lands have been appraised by an independent appraiser for re-sale.

The Blackfoot Community Conservation Area

The Blackfoot Community Conservation Area (BCCA) originated from the Blackfoot Community Project. The BCCA, which is the subject of this thesis, is located in the mid-reaches of the watershed at the southern end of the Bob Marshall and Scapegoat Wilderness Areas and north of the Blackfoot River. The area encompasses an important transition zone between wilderness, national forest and productive valley bottoms, with lush riparian and wetland areas and important wildlife habitat.

In February 2004, when the Blackfoot Challenge and The Nature Conservancy project leaders held the community meeting in Ovando, landowners expressed an interest in keeping the former Plum Creek Timber Company lands surrounding Ovando Mountain (now referred to as the BCCA Core) open for public use and access. The landowners at the meeting identified the area as extremely important for ranching, livestock grazing, timber harvest, and recreational activities including hunting, horseback riding, hiking, snowmobiling and skiing. After the meeting, one landowner suggested the concept of managing the landscape on behalf of the community, like a grass bank. This landowner's innovative idea was the impetus for the BCCA project.

The project involves two separate phases. The first phase involves community acquisition, ownership and management of 5,600 acres of former Plum Creek Timber Company lands. Research questions and results that follow will help define "community" ownership and management.

In January 2004, The Nature Conservancy purchased the 5,600-acre core from Plum Creek Timber Company, with the goal of transferring the land to the Blackfoot Challenge on "behalf" of the community. To accomplish this goal, they initiated the \$10 million private fundraising campaign for land acquisition and management; \$4 million will be used to fund acquisition of the 5,600-acre core, \$3 million for long-term stewardship and management of the BCCA and to cover tax payments to the county for BCP project lands that go to public ownership, \$2 million for the purchase of conservation easements, and \$1 million for project management (TNC/BC, 2004).

The second phase involves extending the 5,600-acre core to include surrounding public and private lands to provide a multiple-use demonstration area for the watershed implementing innovative access, land stewardship and restoration practices across a 42,000-

acre landscape. Land ownership is comprised of USFS-Lolo National Forest, MT Fish, Wildlife and Parks, Department of Natural Resources and Conservation, and a number of private landowners; a Memorandum of Understanding including those parties will be developed to give the agencies the authority and flexibility to experiment with cooperative land management.

Conclusion

In this chapter, I have embedded community forest ownership and management of the BCCA in its larger ecological and social context. If, as I argue in this thesis, the BCCA is an innovative experiment in community-based ownership, then it is important to understand the intersection of the natural resource values associated with the place and the community which is seeking to conserve it.

Located at the southern edge of the Crown of the Continent Ecosystem, the BCCA ranks high for ecological diversity, creating the incentive for landowners and conservationists to explore strategies to preserve the intact nature of the landscape. The Blackfoot Challenge, a 501c3 non-profit watershed group, has been the main institutional entity to develop community-based conservation strategies in the watershed through bringing public and private partners to the table to share information and pool resources. The BCCA developed as result of these cooperative land conservation efforts and the larger Blackfoot Community Project, which involves the acquisition and re-sale of up to 88,092 acres of former Plum Creek Timber Company lands in the watershed.

In the next chapter, I provide a literature review of the key themes that provide an analytical context for landowner perspectives on community forest ownership and management in the Blackfoot River Valley.

CHAPTER 3: LITERATURE REVIEW

In addition to exploring the social and ecological setting of the Blackfoot Community Conservation Area (BCCA), it is critical to examine the analytical context—that is, what does the body of literature have to say about community forest ownership and management in the Blackfoot watershed?

At least four distinct but overlapping themes related to environmental management in the rural west provide reference points to understanding the research related to the BCCA, including 1) the dynamic shift in natural resource management from top-down agency-led planning efforts to the emergence of grassroots-based collaborative conservation efforts, 2) the context of land acquisition as a conservation strategy, 3) the changing character of the American west from a rural, “traditional”-based economy to that of a new west with ex-urban migrants and a service-based economy, and 4) the development of community-owned and managed forests as one effort to link ecological, social and economic values in western landscapes.

Traditional Resource Management in the 20th Century and its Limitations

An important theme with which to frame the Blackfoot Community Conservation Area research and views on its ownership, management and use is the topic of natural resource and forest management over the past century, its focus and its limitations. The story begins on public forest lands in the US in the late 1800’s working its way to current natural resource management policy and controversy.

Most scholars associate the earliest forest management in the US with the leadership and vision of Gifford Pinchot during the Progressive Era who helped grant the Forest Service broad discretion to manage public forests with an emphasis on timber sale revenues as a “social contract” to forest-dependent communities, the greatest good for the greatest number (Hoberg, 2001). This timber “regime” was characterized by top-down agency planning by professional foresters, massive development of timber resources with little involvement by the public. The legislative authority was the 1897 Forest Service Organic Act which authorized the USFS to “improve and protect the forest within the reservation...and to

furnish a continuous supply of timber for the use and necessities of the citizens of the United States.” (Hoberg, 2001: 57).

Post-war changes in land use and recreation resulted in challenges to the former pro-timber orientation and management of public forests beginning with the Multiple Use and Sustainable Yield Act of 1960 and the recognition of the value of non-timber uses including “outdoor recreation, range, timber, watershed, and fish and wildlife purposes,” and eventually led to a series of legislative and legal campaigns by environmentalists as their political voice grew through the 1970s. Laws enacted included: the 1964 Wilderness Act, the 1969 National Environmental Policy Act, the 1973 Endangered Species Act, and, the 1976 National Forest Management Act (Hibbard and Madsen, 2003). These laws expanded the public’s opportunity to participate in planning processes, provided for an administrative appeals process, and put a screeching halt to timber harvest on public lands (Hoberg, 2001).

The wave of legislation created a new player in US forest management beginning in the 1990s—the judicial sector and courts which became critical to settling disputes. Present day public sentiment is that timber production has been reduced substantially on national forest lands, with a decreased benefit to traditional timber-based communities. With a more conservative national political environment in the 21st century, gridlock is still the operative word, with policy-makers writing new legislation like the Healthy Forests Restoration Act of 2003 in response to fire and fuels mitigation, which seeks to eliminate complex environmental analysis and give agencies the authority to proceed in a more timely fashion on thinning and prescribed burning projects (White House, 2003).

As the pendulum of forest policy and management swung from pro-timber, top-down technocentric utilitarianism with little public input to the now familiar process by which an agency crafts a proposal, drafts the analysis and presents it to the public for review, with decisions made, most forest management finds its way to contentious public hearings, to the courts and to Congress (Nie, 2003). Such alienation, apathy, lack of flexibility and trust in bureaucratic decision-making has resulted in barriers to natural resource management in many rural western communities, paving the way for an all new way of doing business—through grassroots collaborative conservation initiatives.

Collaborative conservation has been called a pioneer movement in natural resource management (Wondelleck and Yaffee, 2000). Others speculate that the emergence of the

movement signifies the first resource management shift since the end of the 19th century (Cortner and Moote, 1999). Its development is due in large part to history, politics, and changing views of the environment. “Multiple fragmented interests, political power, and the decline of integrative forces have produced impasses at the policy and ground levels. As a result, conflict persists... decisions made rarely hold, and decision-making looks like a game of hot-potato” (Wondolleck and Yaffee, 2000:6). Within this contested context, collaborative conservation efforts have created a new approach to private and public land use and management. Collaborative conservation emphasizes the importance of local participation, sustainable natural and human communities, inclusion of disempowered voices, and voluntary consent and compliance rather than enforcement by legal and regulatory coercion. Win-win outcomes are sought with all stakeholders at the table (Nie, 2003; Weber, 2000). According to Weber (2000), grass-roots ecosystem management and its emphasis on decentralized, collaborative, citizen involvement has taken hold in over 200 rural communities across the United States, mostly in the West, involving more than 30,000 core participants.

Various scholars and practitioners have endeavored to identify the key principles defining effective collaborative conservation. Most agree however that the task is filled with a number of challenges, due to the fact that many of these groups are organic and with innovative strategies for diverse situations and participants. As a result, a defined theoretical framework for collaboration becomes a moving target based on place, purpose, participants, goals and activities.

Still, efforts are being made to analyze what is working and what is problematic in this new style of natural resource management. In Table 1, key principles of collaborative conservation are listed, as summarized by three sources (Cestero, 1999; Wondolleck and Yaffee, 2000; and Snow, 2001). All three sources reference the central themes of diversity, process, innovation/creativity, scale, participation/democracy, and learning. Other noted indicators include monitoring programs, support from numerous sources, and mediative leadership.

TABLE 2. Principles & Indicators of Collaborative Conservation Initiatives

SOURCE	(Cestero, 1999:16)	(Wondolleck and Yaffee, 2000:20)	(Snow, 2001:6)
INCLUSIVENESS/ DIVERSITY	Engage diversity of the group.	Create new opportunities for interaction among diverse groups.	Coalitions of the unlike, often arise when other decision making proved intractable.
PROCESS	Develop an open, permeable process.	Employ meaningful, effective, and enduring collaborative processes.	Deal explicitly with questions of process, i.e. consensus.
INNOVATION/ CREATIVITY	Craft innovative and meaningful projects.	Focus on problem in a new, different way – move forward through proactive behavior.	Seek innovation ahead of mere compromise.
SCALE	Seek local, regional, and national participation.	Build on common sense of place or community.	Often local or regional in terms of political sovereignty; strong sense of place-centeredness in movement.
PARTICIPATION/ DEMOCRACY	Foster broad and inclusive participation.	Foster sense of responsibility, ownership, and commitment; partnerships made of people, not institutions.	Nongovernmental in origin; usually ad hoc and ex parte.
LEARNING	Learn from each other.		Virtually all collaboratives are learning circles.
OTHER (resources, programs, leadership, power, etc.)	Establish credible monitoring programs.	Mobilize support and resources from numerous sources.	Clear reflections of their own leadership, mediative leadership versus polarizing. Most collaboratives are power circles.

Despite the growing support of collaborative conservation, it is not without its critics. A number of critical questions are being asked regarding collaborative initiatives. For some, the point of contention is less about the collaboration process and more about the legitimacy of local decision-making and outcomes on national land and resource issues (Coggins, 2001). Devolution presents many associated conflicts—"the premises underlying collaboratives are untrue, collaboration without clear legal direction is ineffective and unenforceable, local collaboration can interfere with important national plans and policies, and collaboration implicates abdication of responsibilities" (Coggins 2001: 164). National interest groups and critics defend legislation, judges and regulation as the highest mechanisms for natural resource decision-making and reform. The rule of law is superior and contentious public resource issues should be decided and implemented at the national level where the judicial framework retains the highest level of scrutiny and accountability (Coggins, 2001). In this context, these critics argue that power and politics at the local level should be monitored in the matter of public land resources issues.

While Coggins and other critics make an important point, the separation between public and private land issues is problematic as public land policy, property laws, and new market-based mechanisms are blurring the line between private and public resources (Raymond and Fairfax, 2002). For instance, watershed groups may focus on private lands in specific landscapes, but the issues of water, wildlife and other transboundary resources translate into issues broader in scope.

In actuality, beyond whether the issue is of public or private concern, the challenges to collaboration are linked to more in-depth questions revolving around the meaning and use of such concepts as equity, accountability, sustainability, legitimacy and how democratic participation and collective action can be strengthened on issues pertaining to the environment, economy and community (Weber, 2000). Essentially, the key is evaluating whether collaborative governing structures are effectively and democratically gathering the right input, resolving differences and working toward identifying and implementing particular land and resource decisions and practices. For instance, Cortner and Moote (1999: 64) state:

Collaborative decision-making is affected by many variables, including the number of participants included, how the goals are described, the nature of the conflict, and the values at stake...where does the authority to make decisions lie, and is it readily apparent? Who is accountable both legally and morally for the decision? Furthermore, when decentralization occurs and decisions are made by local preferences, congruity at the system level is reduced and there may be losses to the whole—losses that result in barely perceptible overall erosion or in a shifting of damage from one place to another.

Skeptics also point to the question of inclusivity and how all stakeholders can be brought to the decision-making table. The sheer landscape involved in many of these natural resource issues involves a range of individuals and entities that may benefit or lose from conservation activities. Prioritizing who has more value or ownership in these decisions becomes an intractable decision. Furthermore, the question of time and participation in numerous meetings makes it all the more difficult for participants to be represented in decision-making processes. As a result, the key criticisms of collaborative conservation can be attributed to politics of scale, representation and participation.

Community-based collaboration is an effort to devolve authority to local, place-based alliances of affected stakeholders from the community and relevant federal, state, and local agencies. Shared authority between levels of government and between government and citizens through citizen participation in agenda setting, decision-making, monitoring and enforcement activities, blurs the distinction between public and private spheres so important to contemporary preservation and environmental movements. The movement employs cooperation, deliberation, negotiation, and consensus to define common ground and create a common vision for the surrounding ecosystem...They are designed to work within the larger framework of national laws, not in lieu of them (Weber, 2000). Key elements include: diversity and inclusiveness, a open and collaborative process, innovative projects, multi-scale participant relationships starting at the community level, broad participation, and cooperative learning.

Land Acquisition as a Conservation Strategy

The spectrum of conservation tools is as wide and varied as the landscapes and natural resources they serve to protect. With regard to landscape conservation, the diversity of tools includes fee title acquisition, the purchase or donation of fractional interests through

conservation easements, leases, management agreements, bargain and installment sales, purchase options, rights of first refusal, covenants, transfers in trust, transferable development rights, and land-use regulations, i.e. zoning and growth policies (National Research Council, 1993). The purpose of this section is to briefly discuss the use of land acquisition through fee-title purchase as a conservation strategy, and challenges for government agencies and non-government watershed groups like the Blackfoot Challenge.

Land acquisition may be one of the best alternatives for landscape or habitat protection given that ownership conveys the legal authority and means to enact conservation goals to the fullest measure. However, it is not always the most feasible option and presents some key challenges. First and foremost, financing the cost of land acquisition is often beyond the means of most communities interested in conservation, especially in the Rocky Mountain West where real estate values are increasing exponentially (i.e. in the case of the Blackfoot Community Project, an estimated \$68 million). Projects that are successful usually require a combination of federal, state, and private funding sources (Hartmann, 2004). The primary federal funding source for land acquisition is the Land and Water Conservation Fund (LWCF), a special account in the U.S. Treasury from which Congress annually appropriates money to acquire lands for conservation and recreation by federal and state agencies (generated from surplus federal property sales, federal motorboat fuels tax, and a portion of the Outer Continental Shelf leasing receipts) (National Research Council, 1993). A second key public funding source is the Forest Legacy Program, which promotes protection of working forestlands that are threatened by conversion to non-forest uses (Hartmann, 2004). This program seeks to fund conservation easements through a state agency appointed by the governor. In the case of the Blackfoot Community Project, both funding sources will be leveraged with private financial donations and grants to meet project acquisition goals.

Both LWCF and Forest Legacy have limited funding, are competitive, with total annual appropriations varying based on national priorities and government administrations (Hartmann, 2004), requiring a fairly sophisticated political process. Furthermore, in the case of LWCF, four federal land management agencies have the authority to acquire lands (the National Park Service, the Fish and Wildlife Service, the Bureau of Land Management, and the Forest Service), each with wide-ranging missions and mandates (National Research Council, 1993). This means that conservation organizations must also be savvy in terms of

agency priorities, criteria and the process of land acquisition for each. Additionally, large landscape acquisition, if utilizing public dollars such as LWCF, means that landscape-level habitat needs of various wildlife species must be considered, making it essential for more than one of the four federal agencies to be involved, i.e. given existing land ownership and management patterns and the need to connect them.

In addition to the cost, political process and need to bridge ownership between multiple public agencies, land acquisition must also be fit within the context of property rights debates, and the mix between public and private actors and interests involved. According to Geisler (2000), landownership is “muddy and impure,” with overlaps and questions related to the private interest in public land and the public interest in private land. The binary classification between public and private ownership is at best too simplistic and does not capture the truly multi-faceted structure of property: including its connection and relationship to lands around it, how it is financed, managed, and perforated by various title terms and relationships. That means that communities interested in land acquisition as a conservation strategy must understand the nature of fee title ownership and that management decisions may continue to be fraught with complexities that affect a diverse set of interests.

Although not the focus of this thesis per se, it is important to understand some of the challenges related to land acquisition as a conservation strategy, and to document the experiences of partners involved in the Blackfoot Community Project.¹

The Changing Character of the American West

A third important theme from which to understand the following research is the rural restructuring of the west, in large part due to sprawl and in-migration. The rural American West is a region characterized by high alpine rugged mountains, large tracts of public land, clear running rivers and streams, large working ranches, and the last remnants of megafauna like grizzly bears, wolves and lynx and a complex mosaic of landscapes supporting a range of species. Biophysical attractants such as these are the substance behind many of today’s contentious political, economic and academic debates related to natural resource preservation, conservation and sustainable use.

¹ For a more exhaustive review of land acquisition as a conservation strategy, see Fairfax, S., L. Gwin, M.A. King, L. Raymond, and L.A. Watt. 2005. *Buying Nature: The Limits of Land Acquisition as a Conservation Strategy, 1780-2004*. Cambridge, Massachusetts and London, England: MIT Press.

Many argue that the controversies are a result of the shifting dynamics of the west—its history and value to oldtimers and newcomers and the differences between the two. Terms like “the old west”, “the new west,” and the “next west;” “range-riding cowboy to web-surfing modem cowboy;” “working landscapes” and “the lords of yesterday” to “amenity-based lifestyle economy,” “resort communities,” and “recreation-based economies” address the shift in culture and values (Baden and Snow, 1997; Brick et al., 2001; Wilkinson, 1992; Decker, 2001; Jungwirth, 2001). Riebsame (2001:48) characterizes the new geography of the west as the “gentrified range of hobby ranchers and New West homesteaders.” From resource extraction and exploitation to resource preservation, communities in the west are exploring tradeoffs between environmental protection and community sustainability. Baden (1997) characterizes the rub as between the lords of yesterday and the emerging western consensus of newcomers that value natural resources for their ecological benefit.

With increased population and growth in the west, pressures on the land are inevitable in addition to the clash in culture and values. According to US population census data, the Rocky Mountain West is experiencing some of the highest growth rates in the United States. Demographers and economists cite the reasons behind such growth as businesses and jobs shifting away from cities due to more mobile and information technology; the region’s newness as an economic development center; and the quality of life (Power 1996; Cromartie and Wardwell 1999; Riebsame, Gosnell, and Theobald 1997). Stohlgren (1999) examined population growth in several Rocky Mountain states and cities between 1950 and 1990 with the following findings—Jackson Hole, Wyoming increased by 260% in forty years, and closer to this study, Missoula, Montana increased its population by 91% .

Human development is changing the landscape dramatically, through fringe residence around mountain towns and cities, resort development in higher elevation forests, low-density development such as ranchettes and other subdivisions, and extraction and infrastructure such as mining, logging, and road development (Travis et al., 2005). Such impacts generate a long list of consequences to the ecosystem including loss of biodiversity, fragmentation of wildlife habitat, altering ecosystem processes such as fire, drought and other climate changes, loss of water quality and its affects on aquatic species, disturbances in natural vegetation succession and cycles and the introduction of invasive species, soil erosion and run-off. It also affects the entrenched rural and cultural norms that are linked to land use,

such as loss of working farms and ranches, and loss of timber and agricultural jobs. It can also be argued that conservation easements—an oft-used voluntary land protection tool by agencies and land trusts for preserving lands—has affected the potential for western “natives” to buy land in the communities they were raised in therein altering western culture and values. Newer and wealthier migrants have moved to valleys in the west and created nature preserves keeping locals off their land with orange paint and no trespassing signs. Numerous studies explore the dynamics and the relationship between property rights, value shifts and affects on land-use. For example, Jackson-Smith et. al (2005) point out that newer in-migrants without farming and ranching backgrounds may depend less on their land for resource productivity and pay more attention to the cumulative impacts of aesthetic and environmental qualities across the landscape, in contrast to generational ranchers who are more aligned with the social ties between individual landowners.

Rural restructuring, in-migration and effects on land use are covered daily in newspapers, websites and bulletins across the west, like NewWest.Net to High Country News to Headwater News; they report on the culture clashes attached to growth, for instance questions related to fifth or sixth generation ranchers being superior to recent migrants to the landscape (Wilkinson, 2005).

One example of rural change is the Blackfoot Valley where wealthier ex-urban migrants are moving to the watershed bringing with them values associated with preserving the landscape for its amenity-based values. These newcomers to the valley are viewed by generational landowners and residents as quick to make decisions about land use and public access without fully understanding the impacts on the watershed community; furthermore, they have the means to purchase large tracts of land which raises land values across the watershed, making it extremely difficult for the children of 4th and 5th generation landowners and residents to acquire land and homes. Additionally, these newcomers often create barriers to long-term cooperative boundary relationships and practices founded in neighbor obligations, livelihood priorities and stewardship by constructing fences, posting “no trespassing” signs, and limiting community access and use (Yung and Belsky, in press). Although a majority of these newer migrants bring with them higher education, transfer or investment income and wealth, and professional and political sophistication that can benefit local rural communities, the view that they are taking land out of production and locking it

up for individual private use creates a gap between new and old residents. Long term ranchers are particularly concerned about absentee ownership, displacement of ranching and ranch families, and the lack of familiarity newcomers have with ranching community culture (Yung and Belsky, in press).

The central question for many in western communities is how can they retain rural lifestyles associated with resource-based livelihoods and cultures amidst ex-urban immigration and a global corporate economy that makes it hard for family-sized farmers and ranchers in the U.S. to compete? Resource-based, rural residents are struggling to maintain their economy and society under these new conditions. Many hope that community-based conservation can assist them with adapting to these conditions. The macro-context of rural re-structuring, changing values, and changing land ownership in the American West underlies both the challenges and opportunities that this study focuses on in the Blackfoot Valley.

Community-Owned Forests: A New Alignment between People and Forests in the American West?

Lastly, the final theme that provides an important analytical context for the research is the development of community-owned and managed forests as one effort to link ecological, social and economic values in western landscapes. In a political atmosphere of distrust and gridlock on natural resource management, some groups and individuals are exploring alternative partnership models that cross public and private boundaries.

Community forests have existed around the world for centuries and merged with a growing movement known as community-based forestry or CBF (Belsky, in review; Aspen Institute, 2005). Community-based forestry is a global effort to realign forest management with its rightful constituency of forest users, and thereby meet the dual objectives of alleviating poverty and protecting forests. According to the Aspen Institute (2005), its emphasis is on community influence over natural resources, inclusion of local residents in decision-making and implementation of forest management, and the premise that the forest provides viable livelihoods for rural communities. In the United States, political and social conflict related to forest management has generated increased interest in promoting community-based forestry. Examples of forest management projects following what Baker

and Kusel (2003) call the “triad of environment, economy, and equity” can be found in every region of the country. Such efforts include: forest and watershed restoration activities, stewardship contracting, fuels reduction, thinning and biomass utilization, the management and harvesting of nontimber forest products and other value-added processing activities on public lands (Baker and Kusel, 2003; Aspen Institute, 2005).

In contrast to community-based forestry projects on public agency lands where rural residents are participating in and benefiting from forest management decisions, community-owned forests are established from transferring private lands with high biological and/or community value to a local governing body that will own and manage the lands for the future. Without such measures, the lands are in essence up for grabs to the highest bidder, posing repercussions such as fragmentation of the landscape, development and/or subdivision, and loss of access for public use. In western Montana, the subject of this study, two specific local watershed groups envision creating community forests that will involve group or collective ownership of private lands with local interests setting rules and procedures for a common vision of forest management (Belsky, under review). These community forests will experiment with new institutional arrangements that explore in practice and policy collaborative decision-making across public and private ownership lines, and cross-organizational coordination mechanisms.

As a new institutional arrangement, community ownership underscores questions and tensions related to property rights, differences between public and private ownership, and the mix between the two. The concept of the “commons” is a useful starting point, not to be confused with “common-pool resources” (which refers to “common property” such as land, fish and water). Common property refers to resources held by a community of users who may designate or regulate access by members and may exclude non-members; private property refers to an individual owning property with the right to exclude others from use as well as sell or rent the property rights (Burger and Gochfeld, 1998). Often juxtaposed with privatization and government control, a commons organized through collective institutions is a time-tested means of governing resource access and control (Burger and Gochfeld, 1998). Of the four property regimes usually cited by theorists—open access, common property, state property and private property—community forests in the American West involve elements of both common property and private property. According to Belsky (in press), community-

owned forests as envisioned in western Montana are a form of group or community-owned private property, and importantly, ownership and management rests largely with a community-based organization.

Today, the line between public and private is blurred and will continue to evolve as the communities and local government restructure incentives and responsibilities providing new alternatives to conservation or “richly textured ownership forms” (Geisler and Daneker, 2000:284). Community forests in the west may also test the theory that cooperation through common use can lead to sustainability and economic viability on local scales, in contrast to Hardin’s bleak but widely cited “Tragedy of the Commons” and link between human population pressure and overexploitation of resources (Burger and Gochfeld, 1998; Hardin, 1968).

Adding to the overlap between public and private property and ownership is the strong emphasis on ecosystem management by natural resource researchers, managers and decision-makers. Noted scholars Cortner and Moote (1999) cite that ecosystem management emerged with the shift in the late 1980’s from sustained yield to sustainability and is characterized by four key principles: 1) socially defined goals and objectives; 2) holistic, integrated science; 3) adaptable institutions; 4) collaborative decision-making. Indeed, according to these authors, ecosystem management means “management across ecological, political, generational, and ownership boundaries” (Cortner and Moote, 1999:44). Management occurs in ecological units versus ownership units. Environmental historian, Donald Worster (1993) believes the United States is moving through a second conservation revolution.

The first revolution led to the establishment of the great public reserves—the “inventing of the American commons.” The second revolution is the “ecologizing” of both public and private land use in the United States (Worster, 1993: 107).

The community forests envisioned in western Montana will cross public and private boundaries requiring collaboration at multiple scales.

While many of the above reasons for developing community-owned forests are compelling, scholars point to an important challenge in all community-based efforts, that is-- understanding the complex and indeed political nature of defining community. Agrawal and Gibson (1999) emphasize the ties between poor conservation outcomes and misunderstood

notions of community; they stress the need for conservation practitioners, policy-makers and researchers to shift paradigms from the simplistic view of communities as small spatial units, with homogeneous social structures and shared norms to the more realistic view of communities as comprised of multiple interests and actors that shape decision-making processes. In so doing, attention must be paid to how the community is defined and by whom, who benefits and who loses in community-based efforts? Also, what are the boundaries of the community? What legal, knowledge and spatial scales are established and/or crossed in defining community?

Because community-based efforts are not model-driven, but place-specific, historically informed and more attuned to local conservation issues (Brosius and Russell, 2003), there is more variation in the composition of communities, with stakeholders ranging from new to long-term landowners, private trusts, corporate landowners, user groups, non-profit conservation organizations, public agency representatives, and local and regional legislative interests. The more successful approach may be in founding community-based initiatives on images of community and recognizing their internal differences and processes, and the relationships with external actors with a focus on letting the institution design the composition, rules and norms in these efforts (Agrawal and Gibson, 1999).

As one of the newest institutional arrangements in community-based conservation, community-owned forests provide an avenue for local communities to maintain landscape and cultural connectivity across private forest lands threatened by land conversion and subdivision development. In contrast to the perpetual somersaulting of forest management and public participation, these initiatives advance community-based goal setting, decision-making and implementation of a common vision for forest and natural resource management and further new public and private partnerships in transboundary resource management. Of particular relevance to this thesis, based on their common relationship to community forestry efforts, they seek to link ecological, social and economic targets for forest management. In many community-based efforts, the issue of defining the community is paramount and can make or break the conservation outcome. In designing community-owned forests as a innovative relationship between people and forests, the community (of multiple stakeholders) is imagined, defined, and represented by establishing an institutional structure that engages

the diversity of actors in knowledge generation, rule-making, implementation and resolution of disputes related to natural resource use, management and conservation.

Summary of Themes

The four key discourses that provide a contextual framework for this research include the shift from traditional, top-down technocratic agency decision-making to the onset of grassroots based collaborative conservation efforts, land acquisition as a conservation strategy, the rural restructuring and changing dynamics of the US west from a resource-based economy to a “new west” characterized by old timers, ex-urban migrants and differing values, and the development of community-based forests as an alternative to traditional forest management for cross-boundary, multi-value management of public and private lands. These innovative institutional arrangements may also play a role in redefining, engaging and redistributing decision-making power and authority for local communities in community-based conservation. The next chapter transitions into the participatory research methodology used throughout the two-year project and associated implications.

CHAPTER 4: METHODOLOGY

In this chapter, I turn to the overall design of the research and the specific data-collecting methods utilized. The first section in this chapter addresses the purpose of the study, the key research question, and secondary questions. The next section summarizes the research approach, which builds on a participatory, mixed research design bridging qualitative and quantitative social science methods. The chapter then explores in detail various aspects of the research including the survey instrumentation and administration, the population sample, variables in the study and data analysis. It concludes with implications related to participatory research and the potential tradeoffs that occur in working closely with a community throughout the research process.

Research Purpose

As noted in Chapter 1, the primary purpose of the study was to produce a scientific analysis of the opinions of landowners and extent of community support related to acquisition, use and long-term management of the 5,600-acre “core” within the Blackfoot Community Conservation Area (BCCA) (See Chapter 2 for project acreages defining the project). At the outset of the study, the “community” was defined as landowners and residents living in the geographic areas of Ovando and Helmville due to their proximity to the BCCA; however, the study results help establish a more accurate and robust concept of community for the project, discussed in Chapters 5 and 6.

The central research question was: **What are the perspectives of landowners and residents pertaining to land values and uses, ownership and long-term management of the BCCA?** Secondary questions included: What are the complexities of defining and engaging the “community” in a watershed project? How can landowners in the Blackfoot watershed use this information to develop a management plan for the BCCA? What are the lessons learned in developing a community-owned forest in the Blackfoot Valley? What are the benefits and challenges associated with participatory research?

Participatory Research Approach

To answer the questions central to the thesis, I used a mixed-methodology design (Creswell, 1994), within a participatory framework. This means that quantitative and qualitative data collection methods were integrated to collect more thorough data on landowner perspectives and concerns related to community-ownership, management and use of the BCCA. The overall approach essentially involved interacting with the community to guide the research process and apply the results. Before discussing how this was achieved, the next section characterizes participatory research as an alternative to more positivist or traditional science methods.

Traditional natural science claims to produce knowledge by separating the object of inquiry from the investigating subject, with the objective of posing and answering a research question or hypothesis through examining cause and effect relationships, with a heavy emphasis on validity and reliability of the results (Creswell, 1994). In contrast participatory research engages the researcher and researched in defining the problem, examining it and applying solutions.

Participatory research as a movement has its roots in less developed countries efforts to empower disenfranchised people, giving them the tools to define their own problems, solutions, and shape a new reality (Sohng, 1995). This again is attributed to the traditional positivist approach to research selection, design and implementation which has often resulted in advancing the knowledge and power base of the few rather than the communities studied. Questions include: Who produces the knowledge and for what purpose? Who has access to the research and why? What are the implications of framing the research in the community's voice and context? How would this transform the issue and the results?

Today, more emphasis is being placed on the research process, with the goal of building local participation, sustainability, and action. Participatory research also requires valuing local experiential knowledge as an important component of the issues studied (Brendler, 2000).

Another author (Friere, 1974 in Sohng, 1995) distinguishes the difference between participatory research and more conventional approaches in its focus on social justice and a new partnership between researchers and researched. Friere (1974) claims that it is 1) informed by and responds to the needs of the people, 2) recognizes that empowerment is attained through knowledge, and 3) identifies the inseparability between theory and practice.

It involves a dynamic process of engaging with the community. The researcher, often already living in the community or engaging as a community member, functions as a resource with knowledge about the context or greater issues, and works with the community to collectively identify the problem and research.

Other closely related research methods and terms utilizing the same philosophy include Participatory Learning and Action (PLA), Participatory Action Research (PAR), and Participatory Rural Appraisal (PRA). I use the term “participatory research” to reflect the goal of designing a project that is community-owned and guided research. Various participatory research methods include: direct observations, semi-structured interviews, transect walks, probing, case studies and stories, participatory mapping and dialogue, local analysis of secondary sources, Venn diagramming, matrix scoring and ranking, local indicators, shared presentation and analysis (Chambers, 1999).

It should be noted that the participatory-based approach to research has been scrutinized. Key factors contesting its validity are: the researchers are “captured by the community,” making it difficult to remain objective and neutral; methods can be weak and lack scientific rigour; a relaxed and informal atmosphere in relating with the community can create a naivete about the complexity of group processes, dynamics and power relations; participatory methods are a short-term answer to deeper community sustainability issues and needs; proponents are often poorly trained in research techniques; costs of participation are greater than stated; and lastly, learning from outsiders is different from acting or transferring knowledge into changes in governance (CA Communities Committee, 2003 et al.; Neef, 2003). These criticisms provide important reference points to the following study and tradeoffs associated with participant research.

Methods

The two primary vehicles for data collection were 1) a cross-sectional mail survey and 2) participant observations through my role as a researcher, part-time landowner, and independent contractor for the Blackfoot Challenge.

A cross-sectional mail survey was chosen to gather the opinions of the population sample to aid in future decision-making. The survey helped establish important variables for future ownership and management of the BCCA and provide a baseline to measure change of

values and opinions over time, which are both key benefits to survey research (Russell and Harshbarger, 2003). From a positivist or traditional perspective, survey research is an important way to acquire original data from a sample population that is representative of a larger population (Babbie, 1998). It is often quicker, easier and less expensive than other methods of social research and provides an important credible reference to the opinions of the population. The advantages to a mail survey are many including: refined descriptive characteristics of a larger population, it is feasible to survey larger numbers, surveys can be flexible offering a variety of interpretive options, and standardized questions can more precisely define what is meant versus more open-ended questions (Babbie, 1998).

Surveys usually follow a standard format including design, population and sample, instrumentation, variables, and data analysis. Although survey research generates valuable information that can be worth far more than the cost, planning and execution is absolutely critical. Each phase of the project requires a high degree of diligence, leaving ample room for mistakes, errors and oversights along the way (Alreck and Settle, 2004). Surveys also have other weaknesses. According to Babbie (1998), the standardization can often result in the “fitting of round pegs into square holes.” In other words, by designing questions that will be appropriate to all respondents, the complexity of the topic may well be missed and seem superficial. Similarly, survey research does not adequately deal with the “context” of social life and can be inflexible (Babbie, 1998).

To fill in some of these gaps, I acted as a participant observer for a duration of more than two years as a researcher, part-time landowner, and independent contractor for the Blackfoot Challenge. This role added an important dimension to the research and helped engage the participants in the issue; it required flexibility, relationship-building and dynamic interactions with the community—both Blackfoot Challenge leaders and eventually landowners and users participating in the BCCA project.

As a participant in the process, I made an effort to continuously reflect on concepts, values and methods and to learn through engagement as a facilitator and learner as contrasted to that of an investigator or outside observer. The goal was to participate in an exchange of data-sharing through determining the objective and plan for the research with Blackfoot landowners, residents and conservation partners. Additionally, a priority was given to

emphasizing participation, not only as a means, but also as an end to build capacity at the local level of the effort. Leaders from the Blackfoot Challenge provided important feedback.

Survey questions were developed by myself and Jill Belsky, Professor of Rural and Environmental Social Science and Director of the Bolle Center for People and Forests in the College of Forestry and Conservation at the University of Montana, and leaders within the Blackfoot Challenge. Funding was provided by the Kelley Foundation, a non-profit organization located in Massachusetts concerned about improving health, environmental and social and human services. The Blackfoot Challenge leaders reviewed several drafts of the survey prior to mailing. The survey was also approved by the University of Montana's Human Subjects Board and has respected both confidentiality and anonymity of respondents.

Defining the population sample was a critical part of the research process and involved locating the range of interests in community-ownership, management and use of the BCCA. As discussed in Chapter 2, the Blackfoot Challenge defines their operating area and constituency as the Blackfoot watershed, which is comprised of seven distinct communities, 3,002 households, and approximately 8,096 year-round residents. The BCCA project area lies in the mid-reaches of the watershed and is geographically proximate to the communities of Ovando and Helmville. Additionally, hunters, snowmobilers and other recreationists that are residents and non-residents of the Blackfoot watershed also use the area.

Three factors helped create a study boundary for distribution of the mail survey, including 1) cost of survey implementation, 2) geographic proximity to the project area, and 3) input from Blackfoot Challenge leaders. The cost for survey printing, mailing and follow-up materials limited the number to a maximum of 400. Secondly, given the physical and spatially-oriented boundaries of communities within the Blackfoot watershed and historical use and connection to various resources, the two communities most closely tied to use of the BCCA were Ovando and Helmville. Lastly, in an effort to follow the participatory research process leaders within the Blackfoot Challenge helped draw the study boundary as an important first-level phase of public participation in the BCCA.

The final population sample included 100% of the landowners and residents within the study area, totaling 370 potential respondents or households. It should be noted that the original population sample that we (Jill Belsky and myself) identified was based on a random

cross-section of the entire watershed community; however, given the above-mentioned factors, a smaller geographic study area was chosen.

The mailing list was developed from two primary sources, including 1) the Blackfoot Challenge’s mailing list sorted by Ovando and Helmville residents and landowners (acquired through the Montana Department of Revenue, 2000) and 2) cross-checked with county records on landowners owning land with the following legal descriptions: T15N R13; T15N R12W; T15N R11W; T14N R13W; T14N R12W; T14 N R11W; T13N R12W; and T13N R11W (that is, Woodworth east to Arrastra Creek, south to Helmville center and west to Elevation Mountain). An adult 18 years of age or older from each household was requested to complete the survey. A total of 347 surveys were successfully mailed (i.e. they were not returned as undeliverable or duplicates) of which 193 were returned by the closing date. Table 3 shows the profile of survey respondents based on zipcodes. The survey did not assess permanent or seasonal residency, which is further discussed in the next section. As such, the details related to absentee or part-time residency is unknown related to the addresses based in “Western Montana, Other Montana and Out of Montana.”

Table 3. Profile of Surveys Mailed Based on Zipcodes

AREA	N	% of Total
Ovando	117	(34%)
Helmville	78	(22%)
Other Towns in the Blackfoot	12	(3%)
Western Montana	66	(19%)
Other Montana	13	(4%)
Out of Montana	61	(18%)
TOTAL	347	100%

The survey was designed using elements of the Total Design Method (Dillman, 1978). It was constructed as a professional 12-page 8 1/2 x 7” booklet. No questions were

asked on the front or back covers. The questionnaire was printed on off-white paper with a photograph on the front cover and titled “Proposed Blackfoot Community Conservation Area Survey: Your views on future use, ownership and management.” The inside cover gave a brief introduction to the project and survey purpose, with contact information for Hank Goetz, Blackfoot Lands Director of the Blackfoot Challenge. The survey was mailed on behalf of the Blackfoot Challenge. The back cover was left completely blank except for a space for the Tracking Number used to track responses. A total of 14 questions were asked and ordered in an easy to more complex fashion and grouped into six categories.

A pre-test of the mail survey was sent to 1) colleagues (persons familiar with the project who were able to evaluate whether the survey would accomplish the study’s objectives), 2) members of the Board of Directors of the Blackfoot Challenge and of The Nature Conservancy (users of the data to ensure the questions were phrased correctly) 3) landowners in the Potomac Valley (representing the same population sample but outside of the range of the sample to represent a cross-section of the potential respondents) to establish validity of the instrument and improve questions, formats, and scales. Involving these three pre-test subgroups is standard practice (Creswell, 1994).

The survey was mailed on September 27, 2004, including a survey booklet, a cover letter, a map of the 5,600 acres within the Blackfoot Community Conservation Area, a return envelope with pre-paid postage, and enclosed within a 10 x 13” envelope. Approximately ten days later, a thank you/reminder postcard was mailed to each participant. Landowners and residents that had not responded after two weeks were sent a replacement survey and pre-paid return envelope on October 15, 2004. A deadline was given of October 31 to respond.

The response rate was approximately 56% (193 returned the survey out of a total of 347 that were mailed =56%). Response rates to mail surveys are often lower than those obtained by interview methods (Bryman, 2001). Some reasons for the fairly average response rate may have to do with problems in the mailing list itself, and/or people did not fill it out because of: 1) duplication of parcel ownership (i.e. ownership by same individual, other family members, and/or trusts), 2) deceased individuals, 3) seasonal landowners that had a local address and were not present at the time of the mailing, 4) the short time frame, or 5) seasonal land owners may not have felt close enough to the issues to respond. The

response rate may be an important indicator of the changing demographics of this western Montana landscape and the difficult task of identifying who comprises the community and implementing surveys like this.

Therefore, the results may be biased due to who did versus did not answer the survey. First, despite repeated attempts to develop an accurate mailing list, some folks may have been left out or addresses may have not been accurate. Second, the folks who did not complete and return the survey may be tired of filling out surveys or question their value. It should also be noted that this survey is limited to adults 18 years of age or older; the views of youths (those under 18 years of age) are not included.

After the survey was completed, a preliminary summary of the results was distributed to approximately 1,000 landowners and residents in the Blackfoot Valley and posted on the Blackfoot Challenge website to continue the process of working with the watershed community to engage broad-based participation in the future. Results have also been made available as a reference to the BCCA Council, the citizen-based group that has been appointed to develop a management plan for the project, which will be further discussed in Chapter 6.

Variables in the Study & Data Analysis

Based on feedback from leaders within the Blackfoot Challenge, socio-demographic information of respondents was not collected, due to concern that these questions would be viewed as intrusive, especially in a smaller, rural community with a high-level of face-to-face interaction. In the absence of such information, important variables such as resident location, duration of residence, livelihood, age, gender, household income and education levels are unknown and may present gaps in the data analysis and results. Such differences may be relevant to opinions and to public participation strategies warranting subsequent information gathering activities with this type of data.

Survey questions involved using Likert rating scales (not important/somewhat important/very important), categorical scales (yes/no), and rank-ordered scales (highest to lowest importance). Additionally, a few open-ended questions were included to record opinions of respondents on a few preliminary topics (where closed end answers are not known). The booklet was coded numerically. Each category (not important, somewhat

important, very important, don't know, blank, yes, no, need more information, property owners, specific communities, all residents, anyone, other) was given a code and transferred into an excel spreadsheet which was then imported into SPSS (Statistical Package for the Social Sciences) for analysis. The effort was made to transfer data in as raw a form as possible to reduce interpretation prior to computing the numbers. Frequencies and cross tabulations were run for various categories. The qualitative questions were recorded in an excel spreadsheet and then analyzed for similar themes and discrepancies.

Results are presented in Chapter 5. Means and/or frequencies of answers are summarized. The mean is the numerical average of all of the answers to a particular question (calculated by adding together answers and dividing the number of the people who answered the question). Frequencies are the percentage of people who selected each answer for a particular question. In some cases, the percentages do not add up to 100% because some respondents did not answer a particular question.

Answers to questions that are concentrated toward one end of the scale indicate some agreement on those questions. While on other questions answers are dispersed more evenly across the scale indicating that there is less agreement or mixed views on that question. It is also important to note that it can be difficult to know exactly why people answered a question the way that they did. Two people might select the same answer for very different reasons.

Potential Implications

Participatory research in this study creates a framework for connecting the community, in this case Blackfoot Valley landowners and residents, with investigation of knowledge and values, and initiating a process for grass-roots determination of the goals and objectives in community-ownership and management of the BCCA. This is in contrast to developing research via the traditional, positivist, "hard" science approach, and resulted in a collective and more organic process of asking open questions and seeking solutions. In this study, I sought to combine a mixed-methodology design integrating quantitative and qualitative methods to answer the question of landowner perspectives on community-ownership, management and use of the BCCA. The data-gathering instruments chosen were a survey, in order to standardize questions and responses and provide a more reliable measurement of the participants' opinions, together with participant observations based on

my role as researcher, part-time landowner and independent contractor for the Blackfoot Challenge.

Some key issues that I encountered in balancing my role as participant researcher were 1) designing a project that would have meaning for the community, but still meet scientific inquiry protocol and procedures for academic purposes, 2) using terminology that reflected the community's understanding of the issue, but not leading them in terms of expected results, 3) receiving guidance and assistance from social scientists and other experts throughout the duration of the project in a community that has traditionally felt marginalized by professionals in public agency and university affiliations, and 4) developing a survey that was reliable in terms of types and content of questions but also easy enough to understand and manage by participants, 5) defining the "community" in the Blackfoot, the proposed BCCA, and the research.

The overall participatory-based approach to the study required that certain compromises be made with respect to framing, designing and implementing the research. Examples of these compromises include the omission of socio-demographic variables (length and season of residency, education, income, age, gender) that may have provided important data on the connections between differing values and perspectives on community ownership and management. Similarly, focusing the survey on open-ended questions versus Likert, ranking and/or numerical scales required more time in analyzing the results and less opportunity for characterizing the opinions of the population based on a representative sample. Asking questions that were "softer" in voice may not have provided the most accurate representation of landowner perspectives. For example, the question was asked, "Should the Blackfoot Challenge become the legal owner of the proposed 5,600-acre BCCA" versus "Who should become the legal owner of the proposed 5,600-acre BCCA?" These ownership questions are a result of the participatory research process and the delicate dance that is required between researcher and researched; key questions that should be asked and addressed in further participatory research projects include: How can researchers develop survey questions that provide quality and quantity data to answer the research question in a process or framework that advances community knowledge generation and action and does not alienate them? How is sensitivity to participants balanced with asking the difficult questions related to the research project, and what is the role of the researcher in this

process? In the larger arena of knowledge generation, how can universities and academies work closer with communities in producing knowledge and acting on it to meet mutual institutional goals?

CHAPTER 5: LANDOWNER PERSPECTIVES ON THE BLACKFOOT COMMUNITY CONSERVATION AREA

The overarching purpose of the study was to produce a scientifically-based analysis of the opinions of landowners surrounding the proposed Blackfoot Community Conservation Area (BCCA) with regard to the acquisition, use and priorities for the long-term management of the core 5,600 acres within the BCCA. The study provides an important baseline (or snapshot in time) of landowner opinions that will need to be considered in establishing future management direction and policies.

This chapter presents the results of the study. As noted in Chapter 4, the study was focused largely on a survey administered to the landowners around the core area of the BCCA in addition to the researcher's ongoing observations throughout the duration of the project through participatory research. Thus the results are based on the views of adjacent landowners to the project area and not from residents of the much larger watershed which includes additional communities and long-term resource users of the area.

The chapter is organized around five major themes that emerged from the survey analysis. These include: 1) the relationship between ecological services and social benefits, 2) the value of public access and recreation, 3) the project's economic contribution to local communities, 4) governance and the implications of community ownership and management, and 5) the definition of community and rural lifestyle. Acting somewhat like pressure points, I argue that these themes provide an important basis for planning as well as monitoring how well the project meets its overall goal to develop a multiple-use working landscape that is owned and operated by members from Blackfoot Valley communities under the auspices of the Blackfoot Challenge. The chapter concludes with a discussion of salient issues, values and uses that I argue will need to be addressed in future management of the BCCA.

Community-Ownership and Management: Five “Pressure Points” for Local Landowners

Ecological Services and Social Benefits

Natural resource managers, biophysical and social scientists, policymakers and others point to the critical process of recognizing the competing nature between ecological services (i.e. healthy land, water, and wildlife resources) and the social demands of landscapes (i.e. economics/livelihood, recreation, access, and education). Since the 1970s, the story of how to manage public lands has been one of clashing interests, ideologies and divided “camps” between community ideals and environmental or ecological perspectives, resulting in conflict and gridlock in natural resource policy and management (Burns, 2003). In this study, however, local landowners view the relationship between ecological services and social benefits as reciprocal or symbiotic, and have voiced the need to develop management prescriptions that jointly address both perspectives.

In ecological terms, the location of the Blackfoot Community Conservation Area at the southern end of the Crown of the Continent Divide Ecosystem and its proximity to higher-elevation national forest lands and biologically-productive valley bottoms suggests a richness and heterogeneity in natural resources, which is often indicative of landscape connectivity. Those same ecological services which have contributed to forest, plant, riparian, wetland and wildlife productivity have made the landscape an important place for local community use and benefit for many generations; historical uses include timber production, grazing, recreation, hunting, trapping and other livelihood purposes.

This close connection between ecological and social values was illustrated in the survey results. The first question on the survey asked local landowners to identify what is important to them by scoring a range of ecological and social uses with regard to how important each was to them on a scale of 1-3. These included: timber, rangelands/grazing, wetlands/riparian areas, weed management, wildlife habitat, public access, recreation, aesthetics/viewshed, and linkage to public lands. Survey results indicate that wildlife habitat was the most important value, with a mean of 2.87. Overall, the spread of means was narrow, from wildlife habitat at 2.87 to timber at 2.35 (on a scale

of 1 to 3, with 3 as the most important). This indicates that respondents believed that these values were also "somewhat" to "very important."

Table 4. Land Values & Uses (Means)			
	Mean	N	Std. Dev.
Wildlife Habitat	2.87	190	0.363
Weed Management	2.86	182	0.422
Wetlands/Riparian Areas	2.62	181	0.627
Public Access	2.60	184	0.601
Recreation	2.58	184	0.577
Aesthetics/Viewshed	2.46	178	0.665
Linkage to Public Lands	2.43	180	0.685
Rangelands/Grazing	2.37	181	0.746
Timber	2.35	184	0.739

Moreover, the two highest values attributed to the area were wildlife habitat and weed management (with 87% and 83.4% respectively, of participants ranking as "very important"), emphasizing the tight relationship between the preserving the landscape's natural or inherent resource values and the need for conservation and sustainable resource management.

The next highest categories of value were wetlands/riparian areas, public access and recreation (means=2.62, 2.60 and 2.58, respectively). This also demonstrates community recognition of the overlap between ecological and social services of the area. The categories that ranked the lowest were rangelands/grazing and timber (means=2.37 and 2.35). At a broader level, however, these two uses are still viewed as very important by 49.7 and 48.7% of survey respondents.

Given that over 50% of survey participants ranked wildlife habitat, weed management, wetlands/riparian areas, public access and recreation as "very important," the survey shows a close connection between goals to manage the core area for its natural and social values and uses. This natural/social connection was also evidenced in individual responses to the "other" category of values and uses, where participants included some of the following responses: management of forested habitat, conservation and rebirth, predator control, no development, education, wildlife prevention, firewood gathering, keeping the land on the tax roll, disease and infestation, roads, trails,

ecological integrity of the broader landscape, contribution to higher water quality, watershed function, walk-in area for hunting, multiple use, and fencing.

Narrative comments provided by respondents on the survey also reflect their desire to see a balance between management of the area for ecological services and social benefit. The following quotations illustrate the point:

The Blackfoot Community Conservation Area should be a model of collaborative management for sustained multiple use with conservation values on an equal footing with other values.

It should be maintained as a natural representative area where human use is balanced with preservation of the native animal and plant communities. Human use should be allowed and encouraged, but this should be done with a continual monitoring and analysis of needs of native population of plants and animals in order to provide for mutual survival. This should be an exemplary area for new management ideas for private land management.

A well managed rural area that is open to the public but allows wildlife to flourish.

A ‘showcase’ of stewardship and a well-managed healthy forest, one that the Blackfoot community can take pride in.

In summary, the survey found landowner values related to the Blackfoot Community Conservation Area in order of importance to involve: wildlife habitat, weed management, wetlands/riparian areas, public access, recreation, aesthetics/viewshed, linkage to public land, rangelands/grazing, and timber. Overall, landowners responding to the survey value the landscape for its richness in natural and biological features, given its location and landscape connectivity. Simultaneously, however, they indicated a common understanding that historic and existing public use and access are critical to maintain in the future, and that management decisions should balance restoration and conservation goals. These are the values that the respondents supported. This theme highlights the fact that as management decisions are made, tradeoffs may be necessary to meet both ecological and social goals, some of which are explored in the following sections.

Public Access & Recreation

As noted earlier, the Blackfoot Community Conservation Area has been open for public recreational use for multiple generations. The survey supports the significance placed on continued public access and recreation opportunities on these former Plum Creek lands. Participants' ranked public access and recreation as "very important" uses of the Blackfoot Community Conservation Area with frequencies of 63.2% and 59.1% respectively. The range of historical and existing uses of the land include hunting, hiking, snowmobiling, ATV's, wildlife viewing, skiing, horseback riding, fishing, camping, woodcutting, biking, photography, outfitting and trapping. A majority of the survey respondents had visited the area (72.5%) and many visit the area repeatedly throughout the year.

The survey also asked respondents to rank specific recreational uses on a scale of importance to them. Two thirds of respondents ranked hunting, wildlife viewing, hiking and private enjoyment as very important (means=2.69, 2.64, 2.66 and 2.63, respectively). Fishing, horseback riding, skiing and snowmobiling were ranked next in importance. Vehicle access, ATV access and commercial/for profit recreational use ranked the lowest.

Table 5: Recreation Uses (Percent)			
	1-Not Important	2-Somewhat Important	3-Very Important
Hunting	5.2	19.2	70.5
Wildlife Viewing	5.7	23.3	67.4
Hiking	2.1	28.5	65.8
Private Enjoyment	5.7	21.8	61.1
Fishing	9.3	26.4	56.5
Horseback Riding	5.2	39.9	49.7
Skiing	16.6	34.7	43.0
Snowmobiling	24.4	32.6	38.3
Vehicle Access	45.1	33.2	16.6
ATV Access	50.3	27.5	14.5
Commercial/Profit	52.3	23.3	13.0

Table 6: Recreation Uses (Means)			
	Mean	N	Std. Dev.
Hunting	2.69	183	0.571
Wildlife Viewing	2.64	186	0.592
Hiking	2.66	186	0.518
Private Enjoyment	2.63	171	0.604
Fishing	2.51	178	0.674
Horseback Riding	2.47	183	0.600
Skiing	2.28	182	0.746
Snowmobiling	2.15	184	0.800
Vehicle Access	1.70	183	0.750
ATV Access	1.66	179	1.022
Commercial/Profit	1.56	171	0.737

The opinions related to recreational use clearly point to the importance of wildlife on the Blackfoot Community Conservation Area – both for hunting as well as viewing. The BCCA is part of the Montana Fish, Wildlife and Parks Block Management Program (MTFWP) where private landowners provide public-access hunting on their land. Known as the Ovando Mountain Block Management Area, the land is one of the most popular block management hunting areas across the state of Montana. Hunting as well as trapping opportunities include: elk, moose, mule deer, white-tailed deer, black bear, upland game birds, mountain lion, turkey, beaver, mink, muskrat, otter, fisher, marten, wolverine, weasel, bobcat, raccoon, fox and coyote. According to MTFWP, in 2005, 329 hunters put in 1,647 days of hunting between September 1 and December 1 on the Ovando Mountain Block Management Area. The greatest use occurred during the 5-week rifle season, with 25 hunters present on weekdays and 60 hunters present on weekends (Uchytel, 2006).

In a separate report evaluating resource values of the area (BC, 2003a), the area was ranked high for wildlife use, especially for ungulates and carnivores. The area also rated extremely high for year-round elk habitat. Current values for both grizzly and wolf are moderate with a potential for high depending on future management. Thus the Blackfoot Community Conservation Area and its surrounding lands rank high for their linkage values, primarily in the linkage to public and private lands and the routes wildlife are known to use. Nearly 50% of the respondents to my survey ranked linkage to public lands as very important, as public access is key for travel to national forest and other wilderness lands to the north of the Blackfoot Community Conservation Area.

Non-motorized uses ranked higher than motorized uses on the Blackfoot Community Conservation Area. This is likely due to the fact that a majority of the area is closed year-round to wheeled motorized use (vehicle, motorcycle and ATV access) to support resource and wildlife well-being. Historically, when the land was owned by Plum Creek Timber Company, the area was open to vehicle and ATV use but in response to community meetings and input, the area was closed in 1994 as a result of resource and wildlife damage. The exception to the regulation was snowmobiling, which is still permitted along a main trail linking the other Blackfoot Valley communities of Lincoln, Ovando and Seeley Lake which crosses the BCCA property.

Commercial and for-profit outfitting opportunities ranked the lowest in terms of supporting recreation.. Currently, just one local outfitter holds a permit to hunt mountain lions and conduct group-led snowmobile trips. Most outfitters in the local area have requested permits to use national forest and wilderness lands to the north.

The survey results suggest that recreational uses (both motorized and non-motorized) are important uses that must be considered in future management of the Blackfoot Community Conservation Area. Many of the landowners that participated in the survey expressed a value for the need to conserve the land for general public use and access. Public access is an important concern when one considers that so much of the land is in private hands and thus subject to the dictates of these few but large landowners. Additionally, the value of public access was expressed as a key priority and reason to prevent development of the land and/or subdivision. While a majority of Blackfoot valley landowners and residents support conservation measures, some have raised concerns about locking up private lands with conservation easements due to ownership by out of state landowners (and not likely to involve block management and other schemes to permit public access and use). Comments that highlight the value of public access for all include:

Hopefully the Blackfoot Challenge can manage this land for ALL types of recreational purposes. To keep this land open to the public, instead ofouselots and private property, and FREE for all!

Keep it for the people.

If it becomes private, you will see nothing but red.

I would like to see the area kept for the same uses as in the past and present.

An area open to the public to use for recreation. Not just a few who border it or have the luxury of owning horses.

In summary, maintaining public access for recreation is a high priority for respondents. This is primarily due to the fact that the land has historically and currently been open for a range of public uses, from non-motorized use to motorized use to commercial outfitting and other livelihood purposes, and people do not want to see this change. A second reason for the value of maintaining public access is its high wildlife value, given its proximity and linkage to national forest lands. We see this supported by the result that the two highest recreational uses are hunting and wildlife viewing.

The close connection between recreation and wildlife habitat once again raises the likely necessity of making tradeoffs when decisions are to be made about what to permit or not on the Blackfoot Community Conservation Area. Management direction related to types and levels of access will need to consider both historic and existing use, and how uses foster the connections to uses on adjacent property ownerships. The snowmobile trail that links Lincoln to Ovando to Seeley Lake, and which crosses the Blackfoot Community Conservation Area, has provided an important recreation as well as economic benefit to local rural businesses and communities. Although, some community members do not support snowmobiling due to its impact on the resource, the socio-economic and community benefit will need to be balanced with future use.

Moreover, at a broader planning level, project managers on the BCCA are working with agency land managers on the Lolo National Forest Plan Revision to develop compatible management zones on the property which border national forest lands. Those management designations will be derived based on levels of management and use, ranging broadly from 1.1 Designated Wilderness, providing for minimal human use and impact, to 5.1 General Forest Areas High Intensity Management, providing for a broad mix of forest products and recreation uses (USFS, 2005).

Public access and recreation have raised some of the most controversial debates in community meetings related to the BCCA. A more current profile of how the BCCA Council intends to deal with recreation and public access will be discussed in Chapter 6.

Contributing to the Local Economy

Having discussed the critical relationship between ecological services and social benefits, recreation and public access, a third theme that emerged from multiple questions (See Appendix 1 - questions 8, 9, and 10) were comments about the value of the landscape for its economic benefits, specifically income generation through timber and forest products, grazing, recreation, tourism and education.

The survey results suggest there is widespread consensus that the 5,600-acre Blackfoot Community Conservation Area should provide opportunities to generate financial capital that may be reinvested back into the landscape and local communities. Such opportunities may include traditional timber production of sawtimber, pulpwood, posts, poles and firewood or specialty wood products like edibles, medicinals, crafts, and other finished products. Comments from the survey also support the promotion of tourism and recreation to contribute to the combined goals of environmental stewardship with local community businesses such as B&B's, motels, restaurants, bars, snowmobile, flyfishing and novelty gift shops.

When asked what other community benefits may be derived from the Blackfoot Community Conservation Area, participants responded with the following comments:

Increased use & visitation by recreational users will benefit local businesses. Grazing fees, sustainable timber harvest could fund purchase/maintenance cost.

The draw of hunters, nature buffs, snowmobilers,, etc. will help the local economy.

If it could be selective logged, this would help with maintenance cost and forest management. Recreation may help the local B&B and café, area small businesses.

I think by managing this area sensibly there should be people coming into the area for recreation which would create income for the Blackfoot area.

Still, despite the fact that the community desires that the landscape provide economic benefits to local communities, there is a common understanding that in terms of timber it will take some time for the forest to recover from previous uses, and that a financial investment in restoration will be required. Other less tangible financial returns

are also possible but may play an equally important role related to community benefit. If the landscape is to be used as a demonstration area for sound resource stewardship, the education and research value may play an important role in wider private land conservation and stewardship projects. For example, the USFWS has placed a conservation easement on the 5,600 acres, a legally-binding agreement which prevents development and protects the conservation values for perpetuity. Through educational tours, discussions will be held with local landowners about the possibility of donating or purchasing conservation easements on their private land. Such options create financial returns. A donated conservation easement is viewed as a charitable gift and is deductible from the donor's income taxes. A purchased conservation easement results in cash that can be re-invested in the land for stewardship purposes, placed in or used to develop a family trust, or to buy additional acreage that can benefit the ranch. Other demonstration projects are also being discussed, like stewardship contracting which involves selective logging projects by local timber contractors and mills to return receipts back to local forests for long-term stewardship and maintenance.

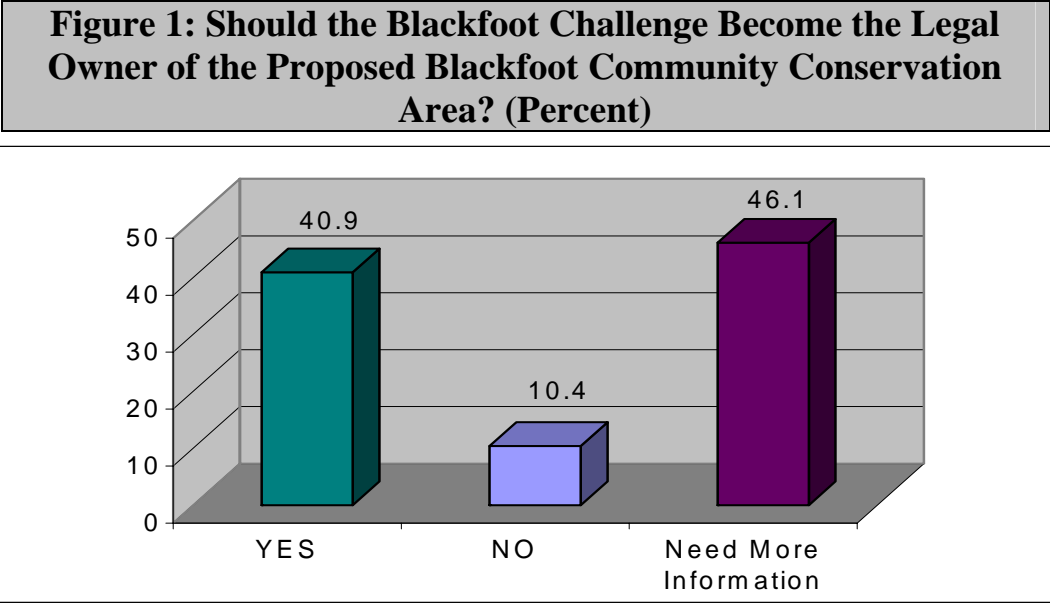
Although the survey did not explore in depth the mechanisms for economic contributions to local communities and their rural sustainability, landowners expressed the need to explore financial investment alternatives to 1) generate income for long-term management and stewardship costs on the BCCA, and 2) provide economic development opportunities to enhance local community growth through generating timber and forest products and employment, offering grazing allotments for nearby ranches, stimulating recreation to benefit local businesses, and creating research and education opportunities for watershed schools.

Governance: Community Ownership & Management

Community-based land ownership, as discussed in Chapter 3, is being discussed as an additional property and management regime to either strictly private or state-ownership, and their respective individual-based or traditional, top-down agency control over management. As a new type of ownership and management practice, the survey asked respondents for their views on community ownership and management. As a new institutional arrangement, it is to be expected that new questions and/or concerns will be

involved and we wanted to use the survey to begin to examine and plan ahead for these challenges.

A decision was made between the Blackfoot Challenge leaders and myself when developing the survey not to ask an open ended question: “Should the Blackfoot Challenge become the legal owners of the Blackfoot Community Conservation Area?” as opposed to “Who should own the BCCA?” This decision was based on the fact that the Blackfoot Challenge is the institutional representative of local constituents and landowners involved in the broader project, with the presumption that they would actually be the legal owners “on behalf” of the broader Blackfoot Valley communities. Approximately 41% of respondents said they support Blackfoot Challenge ownership, however 46% said they need more information to make the decision and 10% said they do not support Blackfoot Challenge ownership. These percentages suggest that the decision as to who will be the legal owner of the BCCA is not as clear as the leadership initially suggested. Indeed, to the contrary, local landowners are themselves unsure as to who should become the legal owners and most importantly, what would this decision entail.



When analyzing the qualitative comments provided in response to this question, five major reasons were cited for supporting Blackfoot Challenge ownership and management. These included: 1) the need to keep the land open and maintain public access with the same uses for current and future generations , 2) that Blackfoot

Challenge ownership amounts to local control and then that management decisions can be determined based on local values, by those who have the greatest interest and understanding of the area versus outside interests, 3) to keep the land from private ownership by a few, 4) the organization is an existing entity with the credibility, structure and partnerships to sustain the plan, 5) Blackfoot Challenge ownership is consistent with the overall values of maintaining multiple use and management and preserving the rural character of the area. Actual comments that support these reasons follow:

Keep the land for future generations to enjoy.

I would like to see the area kept for the same uses as in the past and present.

So local people won't lose more areas to enjoy.

Community (ies) control, local values will dictate management.

Because the Challenge is an already existing/functioning entity composed of persons concerned about the future of the entire valley. And the Challenge appears to be a very democratic organization, egalitarian in nature, sincerely considerate of all opinions.

Management can meet the needs of local residents and control outside influence.

We believe that a locally-owned non-profit organization is most likely to preserve the traditional uses of the land. An outside (even Montana state) organization is far less likely to respect the wishes of the local community with regards to the use of the land. Blackfoot Challenge is best choice because of past history. No need to create new organization.

The Challenge is a mechanism that is already in place and has the means and the expertise to properly help manage the BCCA.

The mission of the Blackfoot Challenge is consistent with what we are trying to accomplish with the Blackfoot Community Conservation Area – namely protect the interests of ranches (grazing), recreationists (snowmobiling, hunting, riding), conservationists (wildlife habitat, wetlands, hunting). Blackfoot Challenge is comprised of locals who are one of us!

Conversely, 46% of survey participants requested more information about Blackfoot Challenge ownership and management, with questions about the organizational charter, capacity, longevity, accountability and the liability that would be incurred with land ownership. As described in Chapter 2, the Blackfoot Challenge is a local, non-profit

watershed organization that has operated since 1993 as a non-advocacy based group. The Board of Directors has stated publicly their guiding philosophy and interest in bringing various public and private partners to the table to make cooperative decisions about land conservation and stewardship. When asked to take positions on issues, they have repeatedly expressed a policy to remain neutral. Those landowners that expressed concern view land ownership as a political act that would require taking a position on land management issues, which at present would conflict with the BC's organization philosophy and current policy. Another concern is what would happen if the Blackfoot Challenge as an organization ceased to exist? This is a realistic concern given the temporal nature of their funding and staff support. As suggested below, respondents were also concerned about procedures for ensuring that the Blackfoot Challenge be accountable for its policy and management strategies? Respondents requested more information about the repercussions of land ownership related to liability, especially given public use and recreation on the area recreating, in addition to the long-term costs for stewardship and maintenance. It is also interesting to note that the Blackfoot Challenge isn't known to all those who completed the survey, or where the current leadership resides. The latter question reflects the idea that a local entity – be it the Blackfoot Challenge or some other locality-based organization should be the legal owners.

The following comments reflect these concerns:

We question the Blackfoot Challenge's resources (financial) manpower and expertise to act as a steward/management of the property. We don't know the future of the Blackfoot Challenge organization 5, 10 or 50 years from now.

Who is the Blackfoot Challenge? Are they local?

I really don't understand what the Blackfoot Challenge is. My first impression is that this is an innovative undertaking and hope it's a smashing success.

How will the Blackfoot Challenge handle liability insurance and maintenance costs?

Who does the Blackfoot Challenge answer to when they screw up? No accountability for their decisions. How many people who run the Blackfoot Challenge live in Ovando or the adjacent area?

I think a community based organization should own it – whether it is the Challenge or not would take a lot of discussion – land management will entail a lot of decisions that will require taking a position – which the Challenge said it will not do.

The Blackfoot Challenge has the wrong makeup and charter. Should stay a non-landowning entity. The Blackfoot Challenge should keep performing very successful ‘honest broker’ role between private and public interests.

Another important set of concerns voiced by several survey participants was the question of how the Blackfoot Challenge would establish a board that reflects the diversity of community interests and make decisions based on those diverse interests. Some respondents wanted to understand more clearly how the management group in charge of the Blackfoot Community Conservation Area would be selected with further definition about out of state influences and their role in the effort. Others expressed concern that the costs and funds required to manage the land over time are large and are likely to necessitate entering into relationship with private financial donors who would assume decision-making authority in the management direction and philosophy. Or conversely, some raised doubts about the need to meet the bottom line in terms of management expenses and administrative needs which in turn would translate into poor choices for the land and its resources.

Lastly, in addition to questions about the nature and capacity of the Blackfoot Challenge organization to own the land, and the future composition and representativeness of a BCCA management group, concerns were raised about the land being taken off the county tax roles. In other words, the land to become the Blackfoot Community Conservation Area was owned by Plum Creek who paid (state) taxes that in some portion is returned to the state and local counties. Given that the BCCA entails transferring it from private (corporate) to private (community) ownership, some were concerned about the loss of county property tax, which can have major impacts on rural community services that fund schools, health, fire and police protection, road maintenance, etc. (Although in reality, private community ownership will still require payment of county taxes.) This comment has been expressed throughout the duration of the Blackfoot Community Project. The project partners would deal with this through a

process known as Payments In Lieu of Taxes (PILTs) which either respondents were unaware of or were unconvinced these would resolve their concern. Residents do not want to see land preserved at the stake of losing income that could help to improve their local communities and economy.

Respondents that expressed that they do not support Blackfoot Challenge ownership recommended organizations with longer track records in management and organizational infrastructure, and explicit management agenda become the legal owners. The following were suggested: The Nature Conservancy, the Rocky Mountain Elk Foundation, and the US Forest Service. It is important to note that the first two represent non-governmental organizations with clear mandates to protect nature and specifically elk, while the last one is the leading government-run agency in charge of forests in the country.

Although respondents had many questions about Blackfoot Challenge ownership, 83% of the respondents expressed support of developing a management plan for the area; 68% support the Blackfoot Challenge taking the lead on the plan with community input. 28% left the answer blank, and 6% marked the “other” category with the following suggestions: community/locals only (3.1%), Blackfoot Challenge with professional land managers/experts (2.1%), other long-term owners e.g. land trust/agency (1.0%), and professional land managers/experts only (0.5%). It should be noted that respondents were not provided with an open-ended question on who should develop a management plan? The decision to focus instead on the extent of support for the Blackfoot Challenge with local community input to develop the plan was a compromise among those developing the survey. The responses suggest support for the Blackfoot Challenge with community input to develop the BCCA management plan for the following reasons: 1) goals need to be set to measure future management activities, providing a key evaluation tool, 2) planning helps build “community understanding & acceptance” of land use decisions, 3) it provides a framework for decision-making for land managers, 4) future conflicts and disputes are prevented, 5) it ensures the public can be part of the process instituting an accountability mechanism, and 6) the plan must be flexible to adapt to changing resource conditions and other unforeseen circumstances.

In summary, the idea that the Blackfoot Challenge would be the owner of the BCCA was 1) supported by 41% of survey respondents, 2) questioned by 46% of survey respondents who requested more information to make a decision, and 3) opposed by 10% of survey respondents. Some key questions related to the difference in opinion are whether those that support Blackfoot Challenge ownership have a more intimate knowledge, understanding and trust of the organization, its mission and capacity to complete the Blackfoot Community Conservation Area project versus those that may not be as closely aware of or in support of its philosophies and programs. Or, what role if any does awareness of the Blackfoot Challenge itself play in these responses and the need for greater education of the Blackfoot Challenge? Could it be that some of the newer ex-urban landowners are more familiar with the institutional challenges that may arise with group governance and land ownership. Unfortunately the survey did not request socio-demographic information on respondents that would have enabled testing of this assumption; these and other implications of how the survey questions were formed and its relationship to tensions entailed in participatory research will be addressed in the final chapter of this thesis. Nonetheless, the survey results did present contrasting views which point to the complex and often contested nature of natural resource ownership and management. It raises concerns about top-down management and non-accountable decisions of a local or community-based organization as well as of a government-led one. These raise important questions about what it means to claim to be representative or “of” a local community? In the case of a broad watershed such as the Blackfoot which contains seven distinct towns, just who is the “community” which the Blackfoot Community Conservation Area serves? Given the diversity within and across each community, how are these interests to be represented and dealt with in a fair and equitable manner? I will begin to address these questions in the next section.

Defining the Who and the What in Rural Community and Lifestyle

As discussed in Chapter 3, the threat of forest conversion to development and subdivision is forcing rural communities to seek alternatives that will protect the natural resources and rural lifestyle associated with these landscapes. Although the Blackfoot Challenge and The Nature Conservancy have played key roles in exploring and

presenting community-based options and alternatives to land use changes, landowners in the Blackfoot Valley have repeatedly voiced concern at community meetings about the watershed's future. The fifth theme that was raised throughout the survey and which I address here involves demographic change and its impact on rural communities, their composition and character, and implications for natural resource management. In the following section, the question of "who represents the Blackfoot community" will be examined, especially in the context of value differences between newcomers to the valley and generational landowners and resource users.

The academic literature reviewed earlier tells many stories of ex-urban migration and rural restructuring. This results in a change from largely natural resource-based economy (such as mining, fishing, logging, grazing and/or agriculture) to a service-based economy and culture. Over the past decades, the Blackfoot Valley has had its share of wealthier exurban migrants buying land and settling (seasonally if not permanently) in the watershed. These newer residents (which range from 1-30 years in residency) are often older and wealthier (from non-natural resource based occupations) and bring with them differing values related to higher education, transfer or investment income and wealth, professional and political sophistication, and urban experience. To the generational landowner or resident in the Blackfoot Valley who has made his or her living largely from the land, the new migrants have values that are often in conflict with their own opinions about land and resource management. One side tends to focus on environmental protection and viewing the land in terms of its scenery rather than understood and manage it largely as a working landscape. I found evidence of these different views in the survey in comments provided by respondents. Again it needs to be acknowledged that I did not ask explicit questions about respondents' socio-demographic characterizes so I cannot make direct comparisons and statistical analyses. But nevertheless, these differences were raised in comments included in the survey as well as ones I heard in my own direct participation and involvement in community meetings as well as the BCCA council which has been operating since 2005.

Long-term landowners seem to have a major concern regarding the project's substantial private fundraising campaign to raise the necessary funds to purchase the former Plum Creek lands and establish an endowment for stewardship costs, and their

fear that substantial donations will buy decision-making power or authority. For example one landowner stated:

My concern is that it be sold to private (or regulated by private interests) such that it will be closed off to the public. We have an increasingly larger number of folks moving into the area that are not connected to our lifestyle. They moved here to relax. Like the residents of this valley but soon are buying large parcels & in several instances changing the traditional use of the land and/or shutting off access. The majority of these people have the time and money to pursue their own interest in subjects like this. The local residents meanwhile are still trying to make a living in this area (primarily through agriculture). They find it hard to get the time and energy to attend lots of meetings. As such they lose out to others. The lifestyle here is the way it was due to hard work and respect for the rights and privileges of others.

Another one stated:

If the Blackfoot Challenge becomes owner of the property the need to satisfy the financial supporters of the area may become the highest priority rather than the protection of the resources.

Some respondents to the survey expressed their concern about new landowners moving to the watershed, purchasing large tracts of land, putting up fences and restricting access to places that locals had previously used for hunting and other forms of recreation. These respondents (most likely long term residents) consistently repeated that people who live in the Blackfoot Valley and especially near Ovando Mountain where the BCCA will be located, have intimate knowledge of the land and especially on their concern for local residents not to lose additional places to hunt and recreate. One respondent stated,

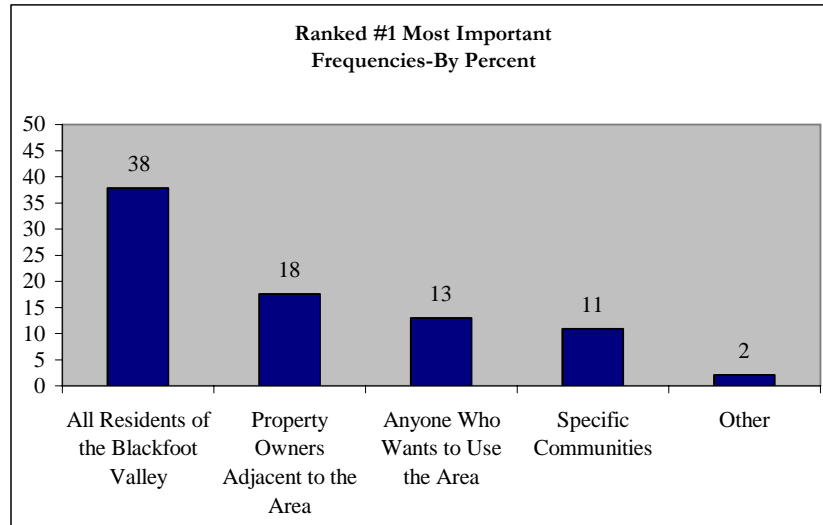
We need a place to take our children and grandchildren hunting, fishing & exploring the woods. The majority of children growing up around here don't own private land and will need some place to go in the future.

As conservation and wildlife preservation efforts increase, individuals from the outside are attracted to the beauty of the landscape and character of rural places. However, as noted in the literature review, their desire to buy land in such places has driven up land values and makes it increasingly difficult for generational residents to purchase smaller acreages. We see this dynamic in the Blackfoot Valley and manifesting itself in a strong value among longterm residents to reserve the BCCA for the activities they value and see

as losing with changes in large private landownership and shifts in community composition and cultural traditions.

Because the question of who constitutes the community in community-led or community-based ownership and management is so important, I did ask directly: “Who comprises the community for whose benefit the Blackfoot Community Conservation Area should be managed by and for?” Respondents ranked as #1 and #2 importance all residents of the Blackfoot Valley. They rated all residents of the Blackfoot Valley more highly than property owners adjacent to the area, anyone who wants to use the area, specific communities or other. Owning and managing the landscape on behalf of the entire watershed signifies that landowners participating in the survey view the project as including communities and landscapes beyond the boundaries of the BCCA and the two towns of Ovando and Helvmille. Additionally, despite the character differences between the seven distinct communities of the Blackfoot, landowners adjacent to the BCCA recognize the importance of conserving lands such as the Blackfoot Community Conservation Area for its contribution to preserving the local and historical values of the valley. Other answers to the question of who comprises the community and for whose benefit the Blackfoot Community Conservation Area should be managed included specific residential communities and/or types of users (i.e. hunters, hikers, anglers, skiers and grazing lessees, and all US taxpayers, educational groups, tourists, full time residents with a 25 year minimum, special handicap access, commercial interests, timber management and contributors to the project through either time or funds). However, there was no consistent pattern in the range of additional answers.

**Figure 2: Defining the “Community”:
Who Should the Blackfoot Community Conservation Area
be Managed by and for? (Percent)**



The survey results are clear that landowners responding to the survey want the Blackfoot Community Conservation Area to be managed for the benefit of all residents of the Blackfoot Valley. They do so however in recognition of simultaneous concerns about the changing dynamics of communities given in-migrants whom bring differing values to the communities and landscape. This is an extremely important dynamic and one which has both points of overlap as well as contestation.

One way to flesh out how survey respondents reconcile values for inclusiveness with their strong desire to continue their traditions of public access, hunting and recreation relates to definitions regarding what constitutes a rural lifestyle in the Blackfoot Watershed. Remember that a key goal of the Blackfoot Community Project in general, and the BCCA in particular, was to maintain “rural lifestyle.” This feature is prominent in all of the literature and justifications for pursuing the project. However, just what constitutes a “rural lifestyle” and the particular lifestyle that the BCCA is to nurture?

I asked the question regarding definition of rural lifestyle as an open-ended question. Responses included a long list of characteristics including maintaining natural-resource based livelihoods such as agriculture and timber; low population density, low crime rate, limited development; being part of a neighborhood community that supports

one another; maintaining open space and wildlife; the ability to have beautiful areas for exploration; the ability to obtain ones' basic needs oneself and from nearby resources (firewood, water, grow own food); and, lastly, living a more simple and less commercial lifestyle than found in most towns and urban areas. To provide evidence for the above list, I include a few direct quotations. Most of the characteristics listed above were included in the following comment of one respondent:

Vast ranch land speckled with cows and haybales, 2) admitting that your lifestyle is worth the \$30,000 you lack in income 3) being a community member and helper 4) living with wildlife 5) understanding that outsiders will always want to visit and utilize the open space 6) seeing mountains, not houses, 7) maintaining tradition, 8) accepting change and protecting from change.

Another survey respondent stated:

Rural lifestyle is where you may walk in the woods, enjoy the beauty, the wildlife. Ride over the other hill and see the sunset. Take your fishing pole out and catch trout for dinner. Camp and spend the night beside a little creek listening to the gurgling creek and feel very close to God and his creations. Watch the sun rise. What really is rural life? Its getting up early in the cold-seeing to the new born calf. Freezing cold. Getting water for the stock. Starting the truck or tractor to get hay for the hungry animals. Holding a new born lamb to nurse. Helping the little pigs keep warm. Staying up all night in case birthing is difficult. Cold, tired, and sometimes very discouraged. Is it worth it? Seeing recreation when a little animal is born. Hearing the birds sing in the morning. Seeing the sun rise over Ovando Mountain. Oh yeah, its worth it.

And another stated:

Rural lifestyle means to maintain the watershed for the agricultural, recreational and economical uses it has been utilized for years. The Blackfoot is what the Bitterroot & Flathead used to be, I hope that our ultimate goal is that we don't end up like they did.

Survey participants are clearly concerned about maintaining a particular relationship to each other and to the land and they wish to see these connections included in the management procedures and outcomes of the BCCA. However, some feel the tension wrought by new and wealthy landowners bringing different values and funding into the watershed and in combination, providing new forces for redefining and changing the way of life occurring in the Blackfoot Valley over many

generations. They are especially concerned that management does not mean strict protection of natural resources and loss of working landscapes and the ill-effects this could have on the local economy, the loss of access to private land for public use, and loss of a tax base. These shifting population and value dynamics will ultimately influence the process and outcome for how the BCCA will eventually be acquired, owned and managed.

Making Meaning of the Results

This study helps to identify some of the key issues that are important to landowners adjacent to the BCCA, and perhaps more broadly across the Blackfoot Valley, related to the ownership, management and use of the Blackfoot Community Conservation Area. First, it suggests an intricate balance between residents' value for ecological services and social benefits. The narrow spread of means for land values and uses in the survey underscores that people see and value an intimate connection among timber, rangelands/grazing, wetlands/riparian areas, weed management, wildlife habitat, public access, recreation, aesthetics/viewshed, and the area's linkage to public lands. Landowners participating in the survey recognize the multi-faceted and symbiotic relationship between ecological and social benefits. How tradeoffs may be made in order to manage the area as a working landscape with balanced multiple use is a challenge facing the BCCA.

The second key theme that this study highlighted is the issue of maintaining public access and recreational opportunities. These former Plum Creek Timber Company lands served as a more or less open access area for local residents. They clearly desire the Blackfoot Community Conservation Area to prevent forest divestment and subdivision, and to maintain it for public use and recreation, especially hunting, hiking, snowmobiling, ATV's, wildlife viewing, skiing, horseback riding, fishing, camping, woodcutting, biking, photography, outfitting and trapping. Non-motorized uses ranked higher in importance as contrasted to motorized uses, but my own personal observation knows how strong the feelings are among those who desire ongoing motorized uses and broad public access. Again the balance between natural and social benefits of the landscape will need to be addressed.

Also key to understanding the move towards community-ownership and management of the Blackfoot Community Conservation Area is the question of the project's economic contribution to local watershed communities. Participants in the study emphasized the need to ensure financial investment and return from the project to benefit local mills, ranches, recreation- and tourism-related businesses and educational institutions in the watershed. It needs to be seen if plans for Payment in Lieu of Taxes (PILT), as well as community ownership and management, can meet if not exceed existing financial revenues; at least it must not reduce them.

Closely related to the value of local economic benefit is the question of who shall be the owners and managers of the BCCA? Survey participants were asked to express their support related to community ownership, with most split between supporting the Blackfoot Challenge and stating they need more information, and a smaller minority saying they do not support Blackfoot Challenge ownership. This suggests that there is no basis for the Blackfoot Challenge to assume that they should own and manage the BCCA, without further community education and support. The survey has shown that there are definitely some landowners who seek an alternative to Blackfoot Challenge ownership and management and question its capacity, expertise, financial reserves and longevity to own and manage the land. How will the Blackfoot Challenge respond to the data? What are some alternatives? How shall alternatives be imagined, tried, monitored and evaluated?

Lastly, the fifth and final theme that was important to landowners participating in the survey is the question of who is the community that the BCCA is to be managed by and for, and whose rural lifestyle is to be protected and maintained? The answer is not easy as it suggests both a value for inclusiveness, yet a recognition of growing diversity in the Blackfoot Valley. Among the values that most see connected to rural lifestyle are a close tie to the natural resources, through livelihood, recreation and aesthetics; low population, crime rates and the lack of subdivision; the neighborhood qualities associated with local communities; and, the simple lifestyle. Perhaps there is enough overlap and consensus in this list that can bring unity in a management plan. What specific management decisions will be the lightning rod for conflict?

The next chapter will take these results a step further to combine them with additional insights from one year of additional participant observation and reflection to conclude the thesis with some recommendations for the BCCA project. These conclusions are intended for the BCCA, but may have relevance for other communities and grassroots initiatives exploring the option of community-owned forests.

CHAPTER 6: REFLECTIONS AND RECOMMENDATIONS

This thesis seeks to advance the study of community-based conservation and collaboration by addressing one of the newest institutional arrangements in the Rocky Mountain West -- private community-owned forests. In contrast to more traditional, top-down public natural resource planning and regulation, community-owned forests promote local decision-making processes and management linking the triad of environment, economy and equity. The purpose of this study was to provide a description of the origins and early planning procedures of the Blackfoot Community Conservation Area (BCCA), and to produce a scientific analysis of the opinions of adjacent landowners to the BCCA regarding their concerns related to ownership, management and use of the area.

Participatory research provided the methodology for the study using both quantitative and qualitative methods. The data for the thesis was based on ongoing participant observations in my role as researcher, part-time landowner and independent contractor for the Blackfoot Challenge and through developing and administering a survey to landowners adjacent to the core area of the Blackfoot Community Conservation Area. In this final chapter, I conclude the thesis with reflections and recommendations regarding the process of moving towards a community-owned forest in the Blackfoot Watershed and possibly beyond drawing on both the survey results and participant observations.

With regard to participant observation, this section also includes observations and reflections developed over the past year and half in my staff support role to the BCCA management group known as the Blackfoot Community Conservation Area Council. The Board of Directors of the Blackfoot Challenge appointed the Blackfoot Community Conservation Area Council in July 2005 to begin developing a management plan for the Core BCCA. A pool of potential Council members was created based on those individuals who stated in the survey that they would be interested in serving on a committee. From that list, the 15-member BCCA Council was selected, comprised of five agency representatives who own or manage land adjacent to the Core (USFWS,

MTFWP, DNRC, USFS, and TNC); five landowners divided between those that represent newer, post-productivist views and generational ranchers; and five individuals representing user groups of hunting, trapping, snowmobiling, wildlife viewing, horseback riding, etc. The role of the BCCA Council is to represent and engage the diversity of interests in the watershed community through developing a management plan for the BCCA Core. The group has been meeting once a month over the last year and a half.

Considerations for the Blackfoot “Community”

The survey data provides key information on the perspectives of adjacent landowners related to their land values and preferred uses of the BCCA. Those participating in the study view each of the land values and uses as part of the entire system – with each land use contributing to the overall health of the social, community and physical landscape. The land values and uses identified include wildlife habitat, weed management, wetlands/riparian areas, public access, recreation, aesthetics/viewshed, linkage to public lands, rangelands/grazing, and timber. Significant differences in the ranking of these values did not exist suggesting a priority for pursuing all, if possible, and where values are mutually exclusive, the need to determine tradeoffs. Priority for BCCA uses should be based on what the thesis sees as a hallmark of this study, which is to nurture the close symbiotic relationship between ecological services and community benefit expressed by landowners, and to maintain or enhance the land through a balanced approach to management and restoration. Striking this balance is complicated by the strong desire among landowners to maintain public access based on the cultural connection to the land for generations of livelihood, hunting, trapping and recreation purposes.

Clearly, managing the BCCA to retain the close relationship between ecological services and community benefit mandates that tradeoffs will need to be addressed as future management decisions are made. One of the most politicized issues that may serve as a “lightning rod” for conflict within the community is the subject of motorized use and access. As ATV use becomes more common and for some, synonymous with expanding the recreation economy in local towns, the Blackfoot Community Conservation Area Council is grappling with how the use will affect the ecological health of the landscape

on various scales; how it will benefit local communities economically; and to what extent permitting ATV use in general or perhaps in particular areas will set a precedent for other negative, more frequent resource impacts in the future.

Over the past few months, the BCCA Council has defined various options regarding ATV use, including maintaining the current policy with limited use on open roads, prohibiting ATV use entirely, or opening up other roads, with varying degrees of restrictions based on the number of users, enforcement mechanisms and time of year. The discussion usually is linked to who the BCCA is being managed by and for. Those Council members that want to see more ATV use fall back to the premise that not all recreationists are either physically able to hike or have the means to explore the area by horseback. They also question the difference between allowing snowmobiles (which at this point will be permitted) versus ATVs. By contrast, Council members that support prohibiting ATV use point to the environmental degradation caused by the machines, citing examples of other areas in the region that have been desecrated, and their desire to see the BCCA landscape restored. One of the ways that the Council is reaching consensus on the issue is by taking the time necessary both in monthly Council meetings and work groups to discuss the pros and cons of ATV use, in a setting where there is trust and relationships, and a desire to reach a solution that is palatable to both viewpoints. At this point, the draft recreation policy supports limiting motorized ATV use to open established roads, which means maintaining the current policy.

Another divisive issue that may arise is the question of commercial use. Already questions are surfacing related to how to balance the health of the resource with community benefit, including what types of permitted commercial use, location, duration, number of users, and fees associated should be permitted. Motorized ATV access and commercial use are just two examples of the use conflicts that are likely to necessitate trade offs and attention to how to resolve conflicting uses. This study suggests that a criteria for determining trade offs need to continually emphasize the interdependence between ecological and social sustainability and managing for both.

With respect to governance, or the rules and procedures regarding access and use, most of the landowners surveyed are split between supporting a community-based group being the owners as a way to preserve public access and use and to provide the flexibility

to manage the land based on local values and input, and questioning community ownership. A smaller minority stated that they do not support Blackfoot Challenge ownership, largely due to questions about the organization's charter, capacity, longevity, accountability, and the liability that would be incurred by owning land. Landowners raised concerns about the composition and election of a management group and whether it could represent the diversity of interests across the Blackfoot Valley. Alternatives to Blackfoot Challenge ownership that were suggested include the US Forest Service, the Rocky Mountain Elk Foundation and The Nature Conservancy, as agencies and organizations that may have a more established administrative foundation and land management track record.

Some suggestions for responding to the issue of community ownership are to 1) explore public or private ownership with specific entities and strengths/weaknesses associated with each, and 2) respond directly to landowner questions about how community ownership would be implemented through the Blackfoot Challenge. Given the nature of funding and public land acquisition, the USFS-Lolo National Forest would serve as the most likely agency alternative to community-ownership especially given that their lands border the BCCA to the north. However this would require the USFS-Lolo National Forest having both the political backing and funds to purchase the property. The other two public agencies that border the BCCA, the DNRC and MTFWP, are not likely to have the funds or interest in acquiring additional lands in the area. A second alternative to community ownership would be private ownership of the area by one or more individuals. Although project partners have already begun moving towards community ownership via the Blackfoot Challenge, options for examining these ownership alternatives would be to hold a series of public meeting with representatives of each discussing how they would manage the land; to administer a secondary survey to landowners as well as to agency and other groups to further explore the political, administrative, and management differences between agency, community and private ownerships and support for each; and/or to conduct one-on-one interviews with a diverse sample of community members to solicit opinions about ownership preferences.

Blackfoot Community Project partners have chosen to follow the second option of providing more information on community ownership through the Blackfoot Challenge,

their preference for an ownership arrangement. After the survey was completed, the Blackfoot Challenge developed and distributed a “Question and Answer Fact Sheet” across the entire watershed community. The Fact Sheet addressed questions related to the mission, philosophy, board representation and achievements of the Blackfoot Challenge, how loss of county taxes associated with transfer of ownership from Plum Creek to others would be addressed, and the issue of liability. They have continued to work on engaging the various Blackfoot communities through semi-annual project updates, public meetings, field tours and through the work of the BCCA Council noted above.

Most importantly, to respond to questions related to the Blackfoot Challenge organization, ownership implications and decision-making structure, the Board of Directors of the Blackfoot Challenge implemented a membership program in 2006 inviting all watershed landowners and residents to become a member and participate in nominating future board members. In 2007, two new members will be appointed to the Board of Directors, to broaden diversity and community representation. Also, they now hold monthly board meetings, which are open to the public, in various communities across the watershed. These actions demonstrate that the survey and other recent administration and management issues have highlighted the gaps in community representation and the need to seek alternatives to broaden diversity across the watershed.

Landowners participating in the study also stressed the need to generate funding that provides for the long-term costs associated with land stewardship and management of the BCCA and to contribute economically to local communities through generating timber and forest products and employment, offering grazing allotments to nearby ranches, stimulating recreation to benefit local businesses, and creating research and education opportunities for watershed schools. Since the survey was completed, a sound financial plan has not yet been developed for the property, but it should also be noted that the land is still owned by The Nature Conservancy. Private foundation grants are supporting the project planning and community engagement process. Additionally, project partners and community members are continuing their efforts to raise \$10 million in private donor campaign funds, of which \$3 million will be designated for long-term management of the BCCA and payment in lieu of taxes to Powell County. To date, their

fundraising efforts have raised \$7.5 million. One of the key issues that will be addressed in the management plan is the development of a budget and economic development plan that addresses stewardship costs and local community sustainability. I recommend that the BCCA Council explore some of the innovative projects occurring in other community forestry efforts such as growing the market for local, certified wood, utilizing small-diameter wood, supporting local entrepreneurs and businesses, creating and retaining jobs in the community and enhancing economic diversity (Aspen Institute, 2005). I also suggest that the Blackfoot Challenge address rural economic development, if their mission truly is to conserve the rural lifestyle. Conservation must go hand in hand with rural community viability.

Lastly, a final theme that was raised throughout the duration of this study was the issue of who represents “the community” in community-ownership and how socio-demographic changes are affecting the rural lifestyle of the Blackfoot Watershed and projects like the Blackfoot Community Conservation Area. Landowners participating in the study expressed the need to manage the Blackfoot Community Conservation Area for the community defined as all residents of the Blackfoot Valley, in contrast to specific towns or communities. This definition is particularly striking when one realizes that it was the property owners adjacent to the area who answered the survey and they did not give preference to themselves as the focal community or to special user groups. However, over the year since the survey was conducted and the real task of developing a BCCA plan and deciding tradeoffs have begun, questions are being raised regarding just who is the “community” in the BCCA for whom it is to be managed by and for, and especially who retains ultimate decision-making authority and accountability for management decisions related to the BCCA?

A key factor in debates over who constitutes the Blackfoot community in the BCCA concerns the impacts of rural restructuring in the Blackfoot Valley and especially its effect on population demographics and new land use preferences. These views were not formally developed as a result of the survey, but through my familiarity with Blackfoot residents and ongoing involvement in the BCCA council. Although a majority of the newer ex-urban migrants bring with them higher education, transfer or investment income and wealth, and professional and political sophistication that could benefit local

rural communities, I also see evidence for the view that new landowners are taking land out of agricultural production and fencing it for individual private use. A preference for restricting use to purely amenity-related values and for a small group of users creates a gap in terms of community-based natural resource conservation and management. In contrast, the generational landowners and residents continue to live and work under a resource-dependent ethos that strives to sustain their agricultural, logging and other livelihoods, and is more open to sharing natural resources.

Upon reflecting on these observations, it is my opinion that the BCCA project will provide an important model for community-owned forests in the Rocky Mountain West. On one hand, the landowners and BCCA Council are steadily moving towards developing a management plan for the Core which supports the overall philosophy of a multiple-use working landscape that balances the natural resources with social values of recreation, economy and livelihood, and education. Like many of the Blackfoot Challenge projects, the process is one of bringing diverse interests to the table and building consensus about land management strategies. I have personally witnessed the strength and synergy among diverse people in their quest to explore and develop cooperative community-based resource management decisions, even with respect to some of the more contested issues like motorized ATV access and commercial use.

However, on the other hand, the greater challenge that I see facing the BCCA project is the ensuing tidal wave of ecological, social and economic changes facing rural communities in the Blackfoot Watershed as a result of rural change and restructuring. Members of the Blackfoot Challenge and the BCCA Council strive to be inclusive and to balance differing perspectives and environmental cultural narratives. Still, differences in wealth/income, age, education, life experience and history are emerging as vectors for promoting and sometimes unraveling a consensus that exists and which is important for supporting community-based conservation. Again while based on my personal observations and assessments, I think the division between newer ex-urban migrants and generational landowners is growing as land values outpace and outreach historical productivist land use and ultimately raises the question -- can the goals of environment, economy and equity be balanced? And if so, what mechanisms would need to prevail to accomplish these goals?

In the case of the BCCA, mechanisms are being developed to preserve the viability of the landscape (the environmental leg of the triad). For example, at one of the most recent BCCA Council meetings this year, the recreational use goal was drafted to state: “The goal for recreation is to provide for responsible use at sustainable levels to benefit the public and the **health of the resource.**” Council members (including ranchers, loggers, wildlife advocates, and agency representatives) requested that priority be placed on maintaining ecological health. What this means in the future is to be seen, given that repeated timber harvest has meant much of the BCCA core requires restoration. However, the draft recreation policy will retain public access consistent with the land use practices regulated by previous Plum Creek Timber Company ownership. The two pieces of the triad that face greater risk and may possibly weaken the overall effort of developing a community-owned forest are local economy and equity. In terms of economy, the scale of investment required for forest restoration and stewardship is fairly substantial and will require creative financial strategies, let alone working towards creating economic opportunities for local communities. In terms of equity, due to the changing structure of local communities, there will continue to be the question of who has the right to participate in decision-making, authority and enforcement related to the BCCA?

Bringing the thesis study back full circle to the research conducted on the ground, I think it was absolutely critical that the study followed a participatory framework using quantitative and qualitative methods. The survey was designed to answer questions of direct relevance to those who would eventually have to figure out who shall own and how to manage the BCCA. It provided key data that has been used by the Blackfoot Challenge leadership and BCCA council to answer questions and inform alternatives regarding community ownership, to develop a diverse community-based management council, and to establish a foundation for and baseline of the issues, values and uses and guiding philosophy for long-term management of the BCCA. Equally significant in the process was my personal involvement with the Blackfoot Community Project leaders as well as the general public through public meetings, and one-on-one conversations. I think that my choice of questions and research collection style was participatory and in the end resulted in more useful and meaningful questions and analysis of the opinions of

landowners related to community ownership, management and use of the BCCA. The participatory research approach helped put the people back into the equation of forest planning by seeking their input, guidance and engagement in developing management goals and a process for decision-making related to the natural and cultural resources in their own backyard. Additionally, the study helped mitigate some of the polarized conceptions by community members of research and the research process – potentially providing a foundation for enhanced relationships and shared learning projects between the Blackfoot Challenge and university academics in the future.

While the mixed methodology framework was key to the project, important pieces were missing from the data collection and analysis process. These relate mostly to a decision not to include questions on the survey related to socio-demographic information of survey respondents with variables that would have assessed age, gender, income, education, duration of residency, and season of residency (part or full-time) and their correlation to landowner opinions about land values and uses, ownership and management. As discussed in the chapter on methodology, the decision not to include these questions was based on my perception that respondents would be uncomfortable answering these questions, and how these data would be used and discussed. Looking back, these questions would have provided important analyses for the pattern of demographic change and how socio-demographic changes might be affecting land use values and patterns, at least according to the adjacent landowners surveyed. These data could have provided an important foundation for addressing larger community economy and equity issues related to the BCCA and community-based conservation projects throughout the watershed.

At the same time, however, the benefits of excluding questions on socio-demographic status should not be underestimated. In my role as a participant researcher, staff member, and part-time landowner in the Blackfoot Valley, I thought it was important to delineate between what's meaningful to me as a researcher and to the research/academic community and what's meaningful to the community in the Blackfoot and make conscious decisions based on that information. At this early stage in the research I wasn't convinced that collecting socio-demographic information would not create additional tensions and struggles. A sometimes hidden but critical component to

that decision-making process entails recognizing the relationship between knowledge and power, and resulting inequities. Traditionally, scientific research within the university has created top-down methods and analytical procedures producing knowledge for experts, policy-makers and theorists. By contrast, this study was organized as a research-with-the-people versus for- or about-the-people project. The community took an active role in guiding and organizing the research needs and integrating the results into their community-based initiative, paving the way for knowledge generation and utilization. Thus I went with my perception that delving too deeply into personal indices of wealth, education and length of residence would itself create differences and tensions which I did not want associated with the research, nor with myself. So in making the tradeoff of omitting certain types of data, hopefully the alternate goal was met of generating data that will enable cooperative social change.

Beyond the Blackfoot

I suggest that this study may offer some insights and recommendations for other community-owned forest initiatives in the West. First, this project demonstrates the close connection between ecological services and social benefits. Recognizing the common links between the two can build community cohesion and enhance the cooperative process in developing a management philosophy and stewardship plan for community-owned forest lands. Furthermore, to deal with the complexity of managing landscapes based on ecological and social sustainability, *adaptive co-management* is required. This term has been used for managing resources across institutional organizations and relationships (Berkes, 2004), but in this case means managing at multiple ecological and social scales, and with recognition of the dynamic and evolutionary changes associated with social structures and biological processes.

Second, defining “the community” in a community-owned forest is an important preliminary task in developing these locally-based initiatives. Does the community represent a local town or community(s), watershed(s), user group(s), or the national public interest? Exploring the historic and existing environmental narratives associated with the landscape can help clarify the range of users that will play a role in ownership and management. Additionally, land ownership means making fairly political decisions

related to stewardship and management, finances and budgeting, liability, and use. These factors require a governance/administrative structure that establishes a legally-binding operating agreement, managing body that represents the diversity of community interests, as well as mechanisms for decision-making, accountability, enforceability, and sustainability. While the BCCA will be owned and managed through the Blackfoot Challenge, a non-profit watershed group, other institutional alternatives exist including foundations, consensus, “friends of” or land trust non-profit groups, or private conservation trusts, each with strengths and weaknesses associated with group ownership.

Third, although communities seeking group ownership of lands like the Blackfoot Community Conservation Area will inevitably experience the same kinds of management issues and dilemmas that public agencies face, such as the financial costs of stewardship and management and genuine public participation and deliberation in management decisions, it is important to distinguish some of the benefits to community ownership. First and foremost, fee title ownership conveys the legal authority, power and control to the community to make decisions that adapt and co-evolve with the land, as mentioned above. Through active participation in management decisions at the ground level, community members are able to strategize, negotiate and agree on management prescriptions— creating a vehicle for community-based natural resource management in its rawest and truest form. Ownership is perpetual providing the security and trust within the community that the effects of management decisions will be lasting, and reproduced over the course of the next generations. It is a reconfiguration of people and their forests providing for the concrete realization of conservation and community goals.

Lastly, the shift from a resource-dependent economy to an amenity-based service economy holds wide-ranging implications for community-based natural resource management and conservation. The process of constructing, planning and implementing projects like the BCCA becomes more politicized and fraught with issues related to community representation, engagement, and participation and economic benefits to local communities. The increasingly complex nature of community-based natural resource management reinforces the need to join biophysical scientific resource studies and planning with social scientific assessments, information gathering strategies through participatory research, and other innovative alternatives to facilitate conservation and

stewardship projects on-the-ground. This thesis offers one example of the value of participatory research for providing information to foster common understanding and vision in which to build local group ownership and management.

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APPENDIX A: BLACKFOOT COMMUNITY CONSERVATION AREA SURVEY

APPENDIX B: BLACKFOOT COMMUNITY PROJECT MAP

APPENDIX C: BLACKFOOT COMMUNITY CONSERVATION AREA MAP

