

# WELCOME TO THE VERMONT FOREST FUTURE STRATEGIC ROADMAP PROJECT



## Vermont Forest Future - Strategic Roadmap

The Vermont Department of Forests, Parks, and Recreation (FPR) is embarking on a robust public engagement process through 2022/2023 to identify opportunities to help Vermont chart a path forward to protect the long-term viability of forest-based businesses – and the many benefits they provide to the state’s environment, economy, and quality of life.

The outcome of this process will be the Vermont Forest Future Strategic Roadmap which will identify actionable strategies to strengthen, modernize, promote, and protect Vermont’s forest products sector and the broader forest economy.



# Vermont Forest Future Strategic Roadmap Development

## STEP 1

### Explore Perceptions

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

Current Conditions

November – February

## STEP 2

### Future Scenarios and Implications

- Future Think Tanks
- Agency Roundtables
- Engagement sessions
- Stakeholder survey #2
- Identify Preferred Future

Scenarios of the Future

December - April

## STEP 3

### Develop Draft Strategic Roadmap

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

Draft Recommendations

April – May

## STEP 4

### Forest Future Strategic Roadmap

- Future Summits

Final Roadmap

June - November



A cityscape at sunset with a hand holding a magnifying glass over it. The sun is low on the horizon, creating a warm, orange glow. The hand is positioned in the foreground, with the magnifying glass held over the city. The city features numerous skyscrapers, including the Petronas Towers, and a dense urban landscape. The background shows mountains under a cloudy sky.

The key to effective future thinking...

Consider both **trajectory** (direction of change) and **velocity** (speed of change).

# The Importance of Future Thinking



Preliminary  
results  
N=666

# Vermont Forest Future Strategic Roadmap Stakeholder Survey #1

## INTRODUCTION

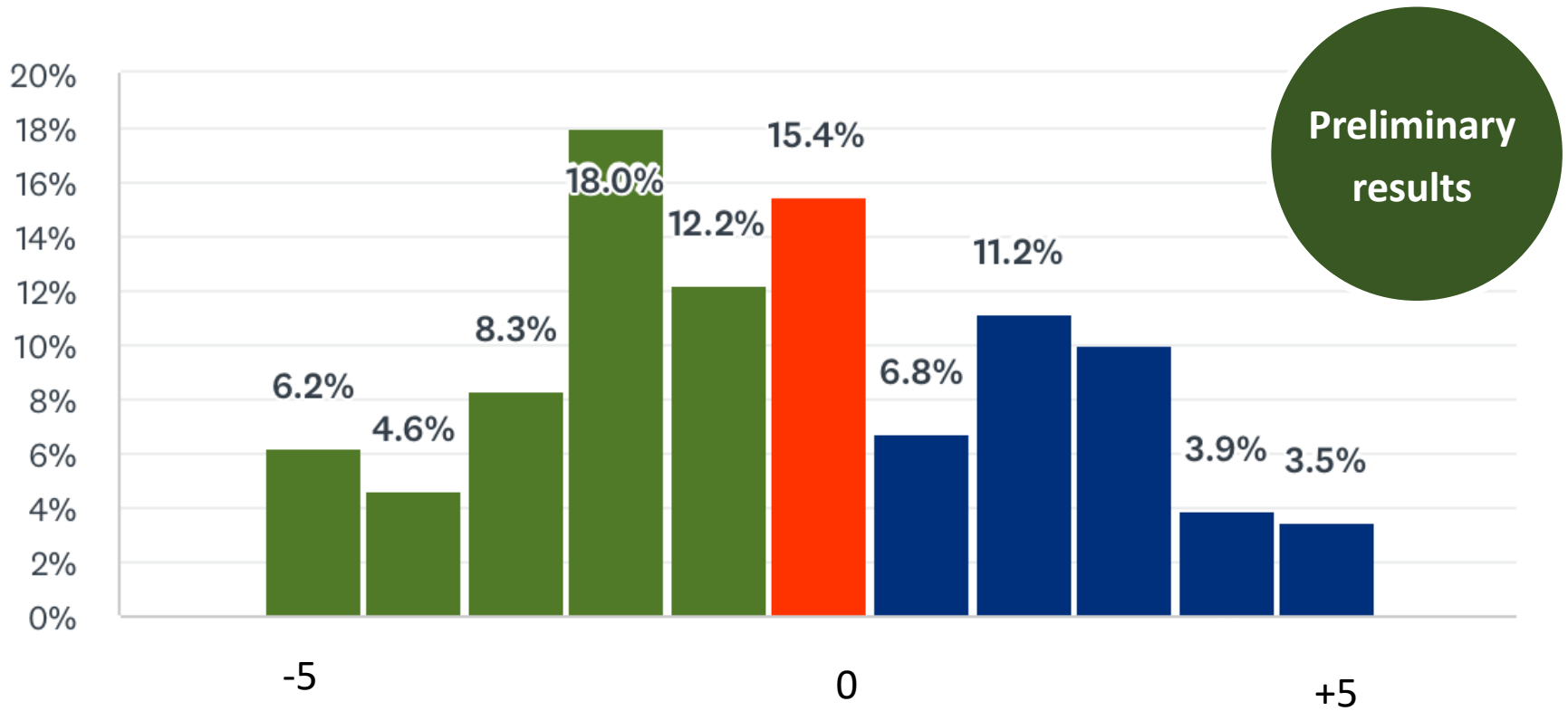
### WELCOME TO THE VERMONT FOREST FUTURE STRATEGIC ROADMAP STAKEHOLDER SURVEY

This is the first survey as part of the Vermont Forest Future Strategic Roadmap project. The Vermont Department of Forests, Parks and Recreation (FPR) is embarking on a robust public engagement process through 2022/2023 to identify opportunities to help Vermont chart a path forward to protect the long-term viability of forest-based businesses - and the many benefits they provide to the state's environment, economy and quality of life. By January 2024, FPR will deliver to the General Assembly the Vermont Forest Future Strategic Roadmap – a ten-year plan to strengthen, modernize, promote, and protect Vermont's forest products sector and the broader forest economy. The project was authorized by the Vermont Legislature and signed into law by Governor Scott in Act 183 of 2022.

## ECONOMIC VIABILITY and IMPACT

### Economic viability of Vermont's forest products sector.

Over the next decade, do you see the economic viability of Vermont's forest products sector increasing or decreasing?

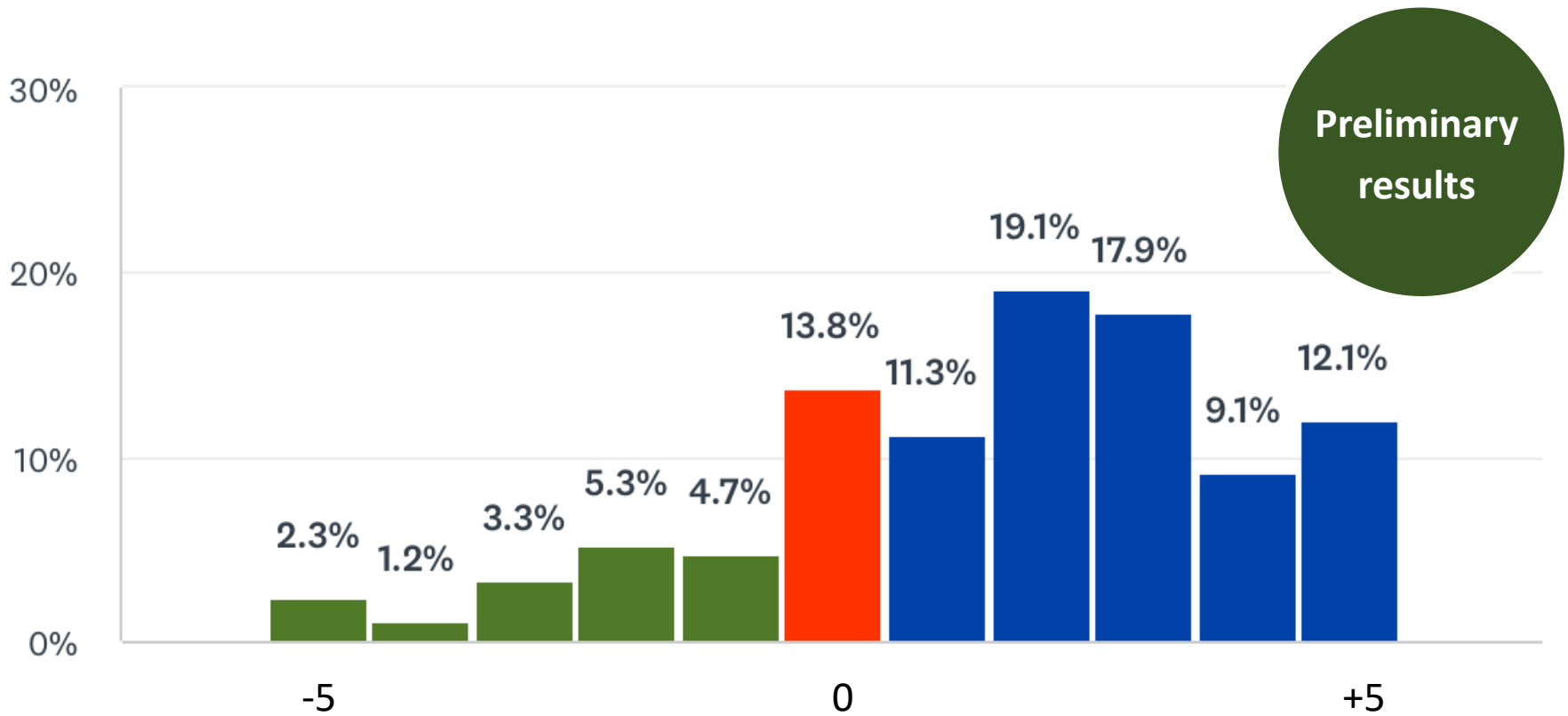


(Scale: -5 = Declining significantly; 0 = Same; +5 = Increasing significantly)

## ECONOMIC VIABILITY and IMPACT

### Economic impact of Vermont's forest economy NOT including the forest products sector

Over the next decade, do you see the economic impact of Vermont's forest economy not including the forest products sector increasing or decreasing?

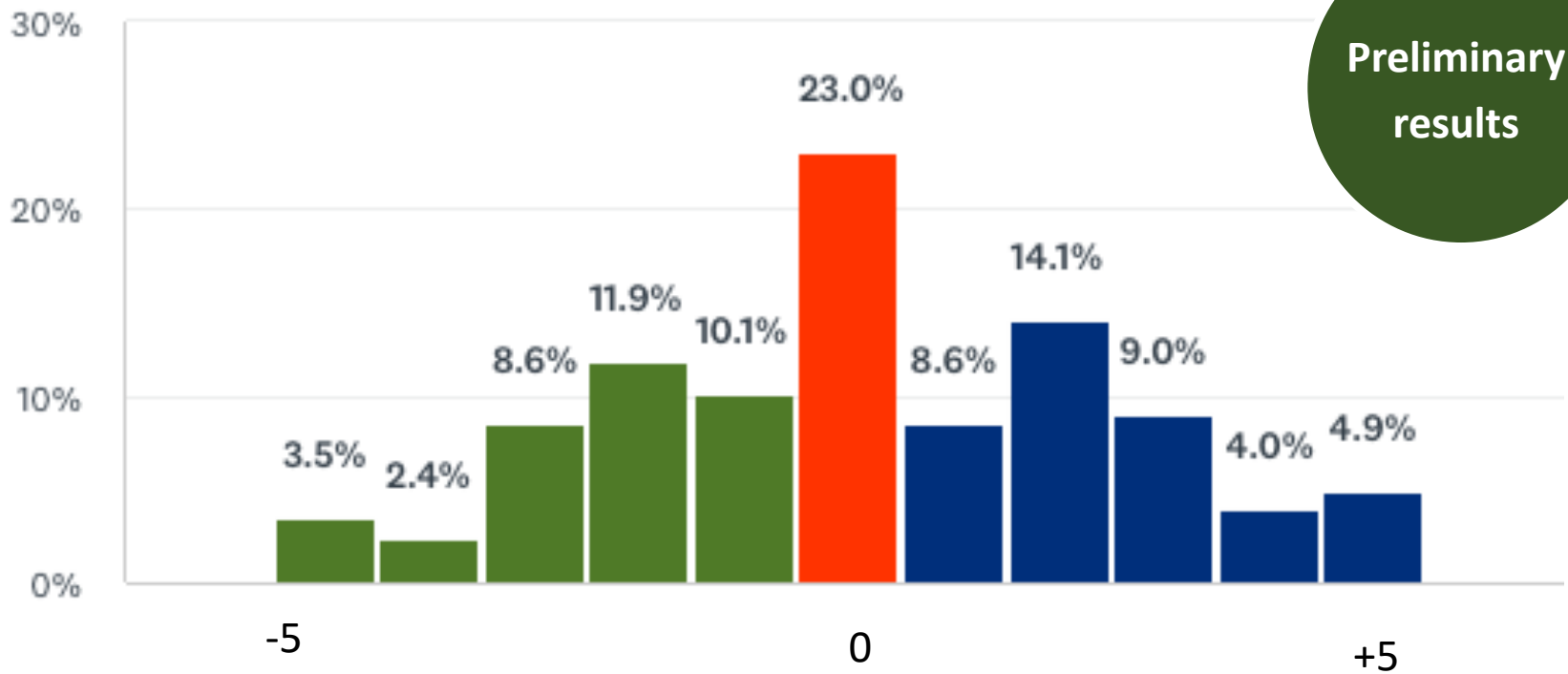


(Scale: -5 = Declining significantly; 0 = Same; +5 = Increasing significantly)

## ECONOMIC VIABILITY and IMPACT

Overall economic impact on forest dependent towns and communities.

Over the next decade, do you see the overall economic impact of Vermont's forest economy on forest dependent communities increasing or decreasing?



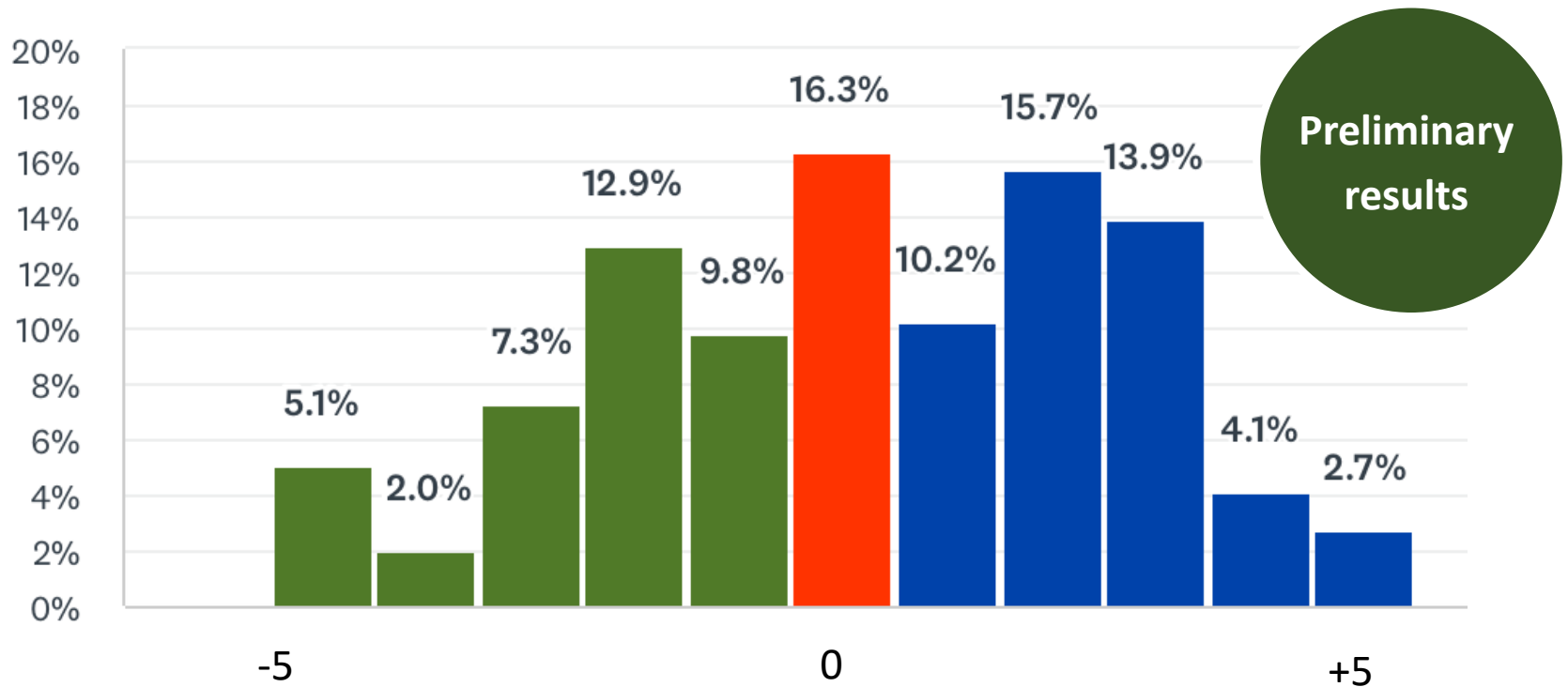
Preliminary  
results

(Scale: -5 = Declining overall impact; 0 = Same; +5 = Increasing overall impact)

## WORKING FORESTS

### Quality of Vermont's working forests

From a forest products perspective, do you think the quality of the working forests in Vermont will improve or decline over the next decade?



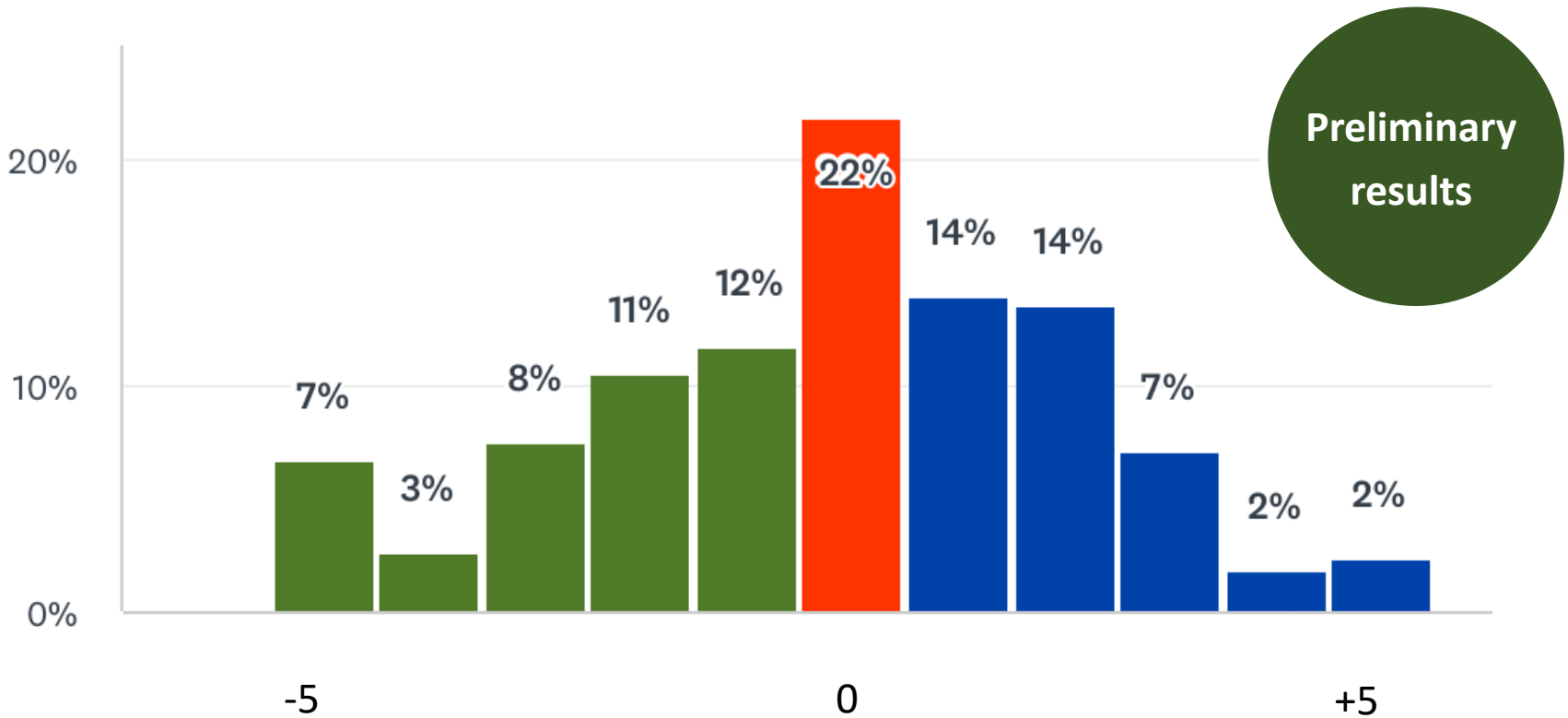
(Scale: -5 = Significant decline; 0 = Same; +5 = Significant improvement)



## MARKETS and INNOVATION

### Processing and Value Adding

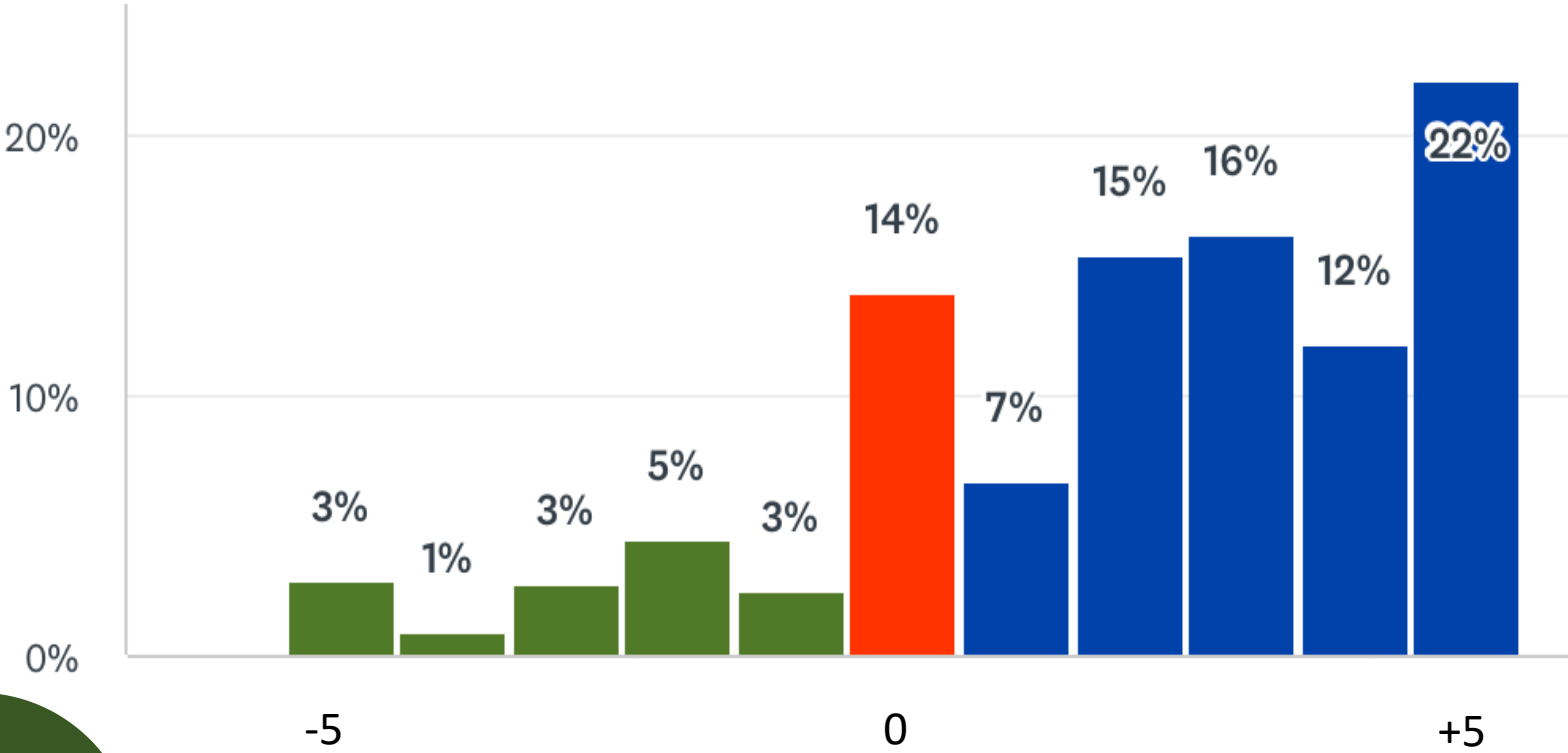
Over the next decade, do you see Vermont having more, or less, local processing and manufacture of solid and composite wood products like those used for construction and home furnishings?



(Scale: -5 = Significantly less; 0 = Same; +5 = Significantly more)

# OVERALL CONTRIBUTION TO VERMONT'S RURAL CHARACTER

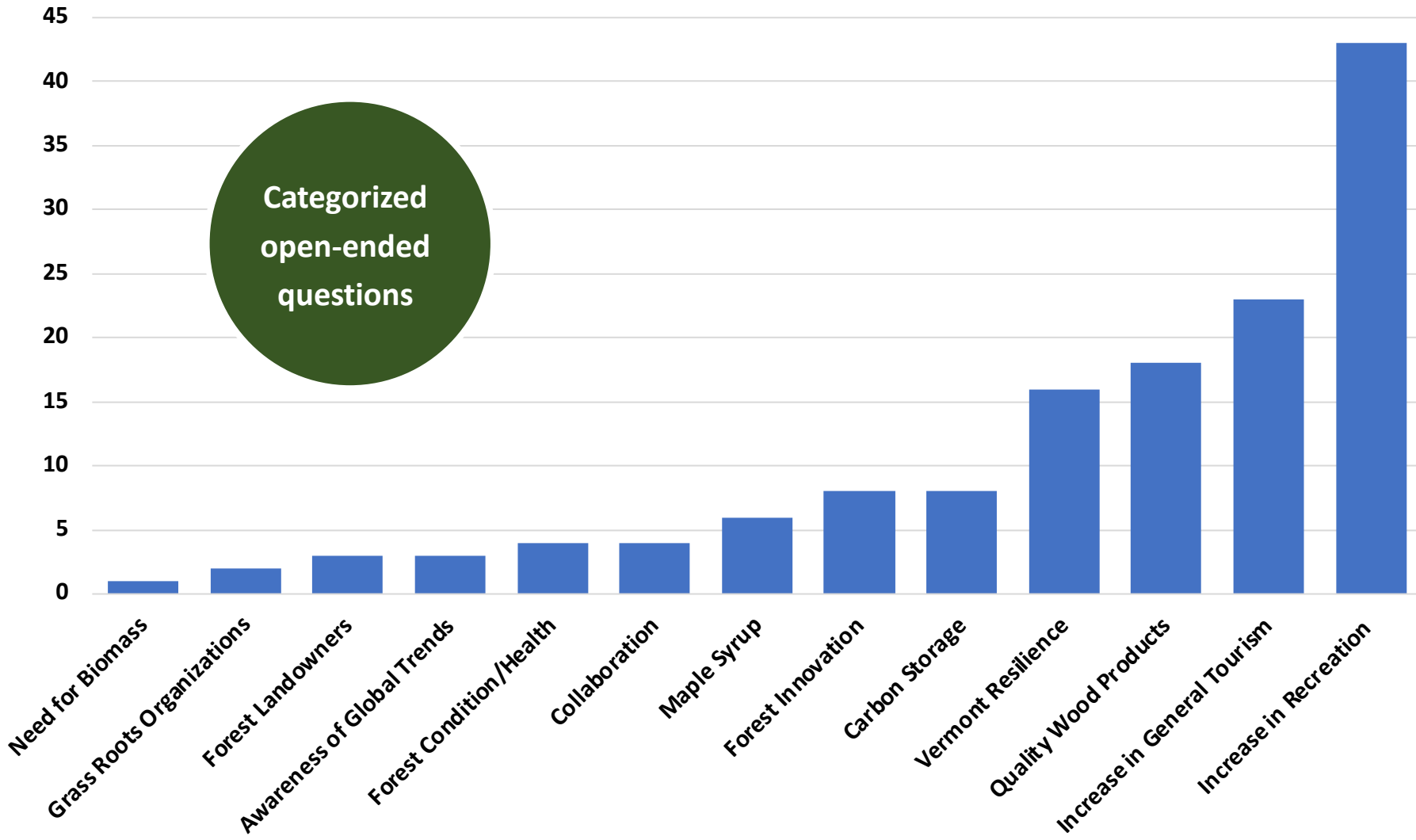
Over the next decade, do you see Vermont's working forests becoming more, or less, important, in terms of enhancing and preserving the rural character and identity of Vermont?



Preliminary results

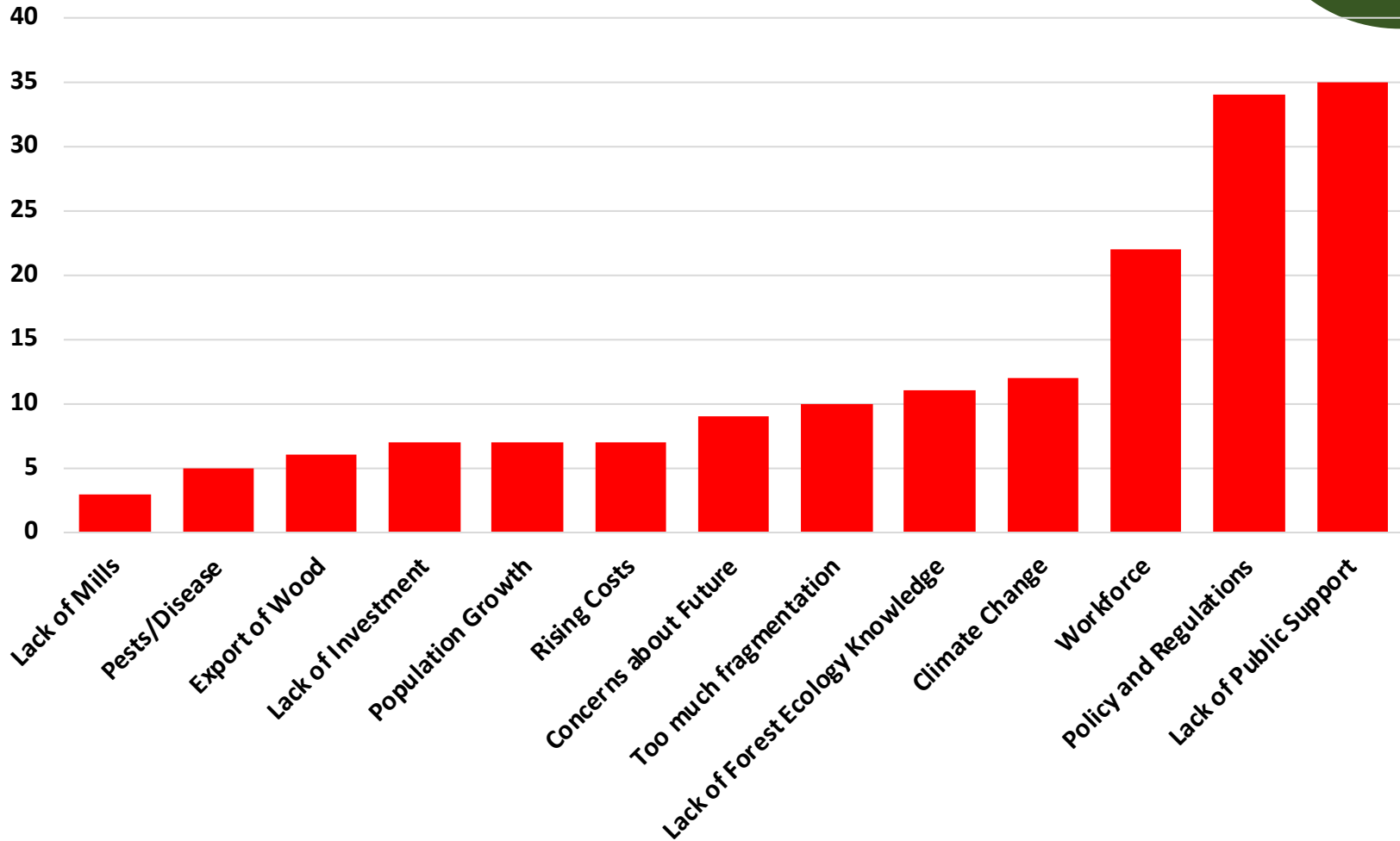
(Scale: -5 = Much less important; 0 = Same; +5 = Much more important)

# What are you most optimistic about in relation to the future potential of the overall Vermont forest economy?



# What are you most pessimistic about in relation to the future potential of the overall Vermont forest economy?

Categorized  
open-ended  
questions



# Key Drivers:

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

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



# Key Drivers Identification

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

# IMPACT MATRIX HANDOUT

VERMONT FOREST FUTURE STRATEGIC ROADMAP

Think-Tank Part 1

December 13, 2022



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

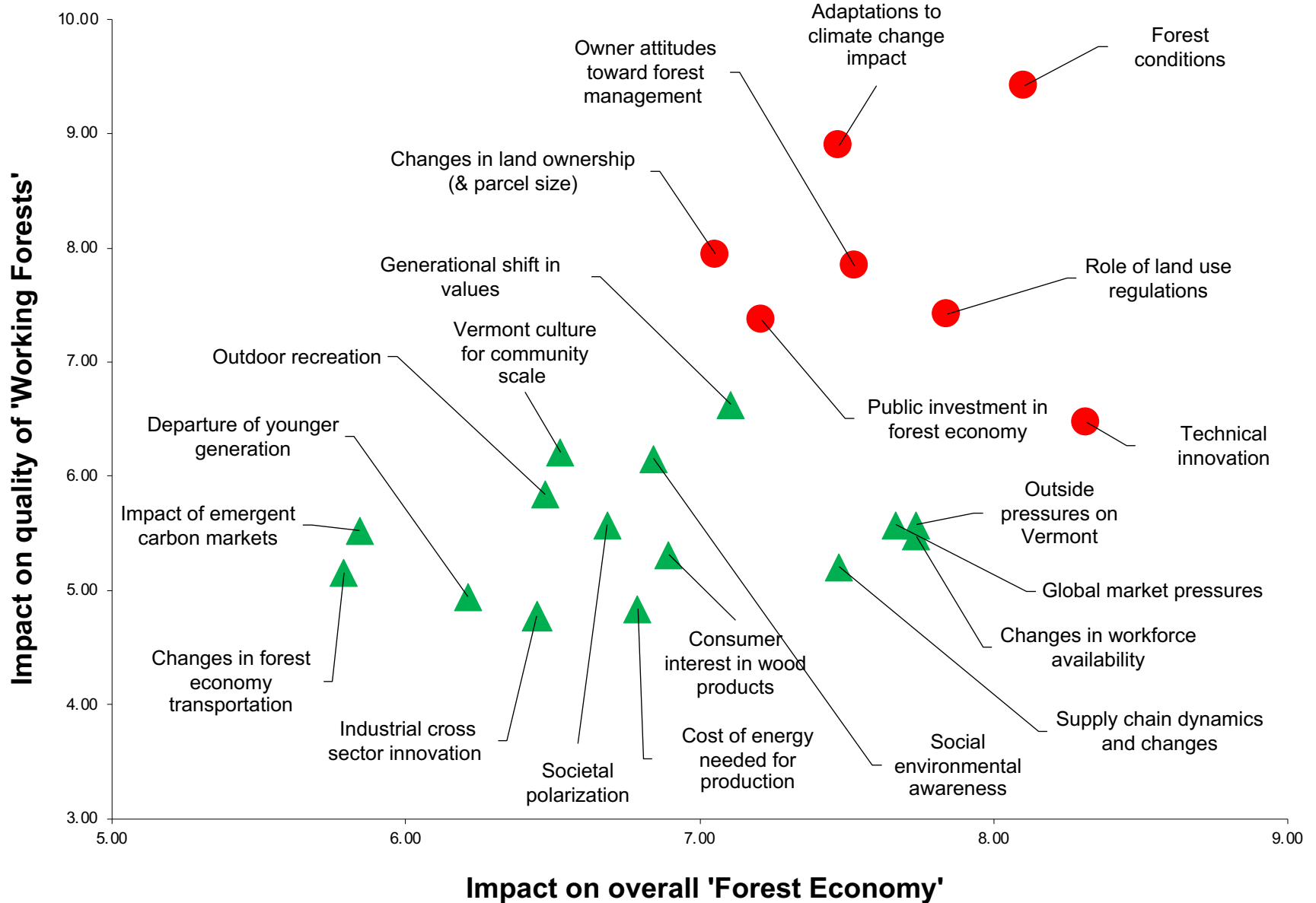
IMPACT SCALE: 1 = Low relative impact; 10 = Very high relative impact

Driver	Dimensions			
	Overall Forest Economy	Quality of Working Forests	Innovation in Forest Product Enterprises	Demand for VT Forest Products
1				
2				
3				
4				
5				
6				
7				
8				
9				
10				
11				
12				

Rating future impact of each driver – individual scoring

# VERMONT FOREST MANAGEMENT

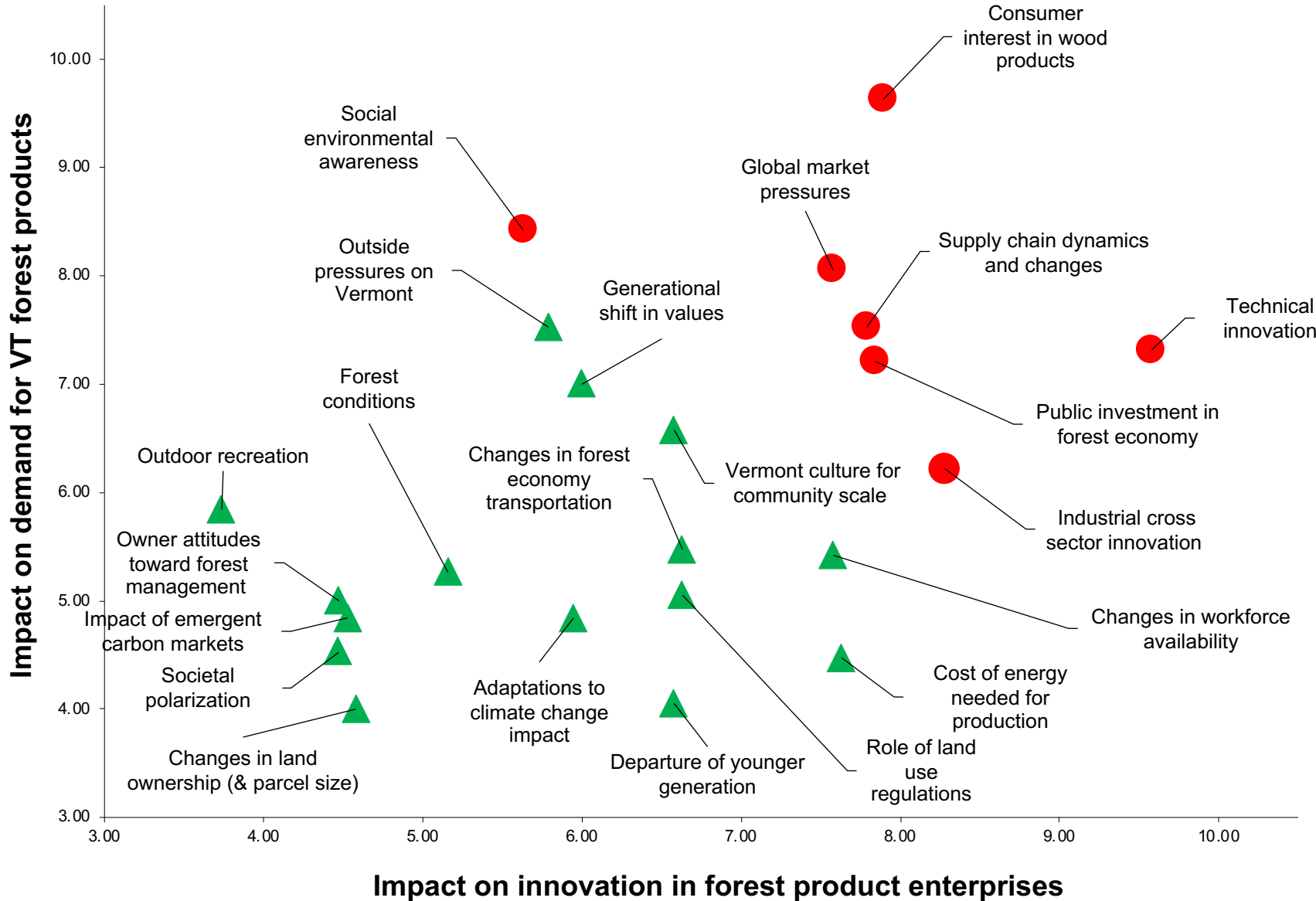
## Scenario-shaping cluster of drivers





# INDUSTRY ADAPTATION

## Scenario-shaping cluster of drivers



# Future-splitting clusters of drivers

## VERMONT FOREST MANAGEMENT

- **Forest conditions**
- Technical innovation
- Role of land use regulation
- Adaptations to climate change
- Owner attitudes toward forest management
- Changes in land ownership (& parcel size)

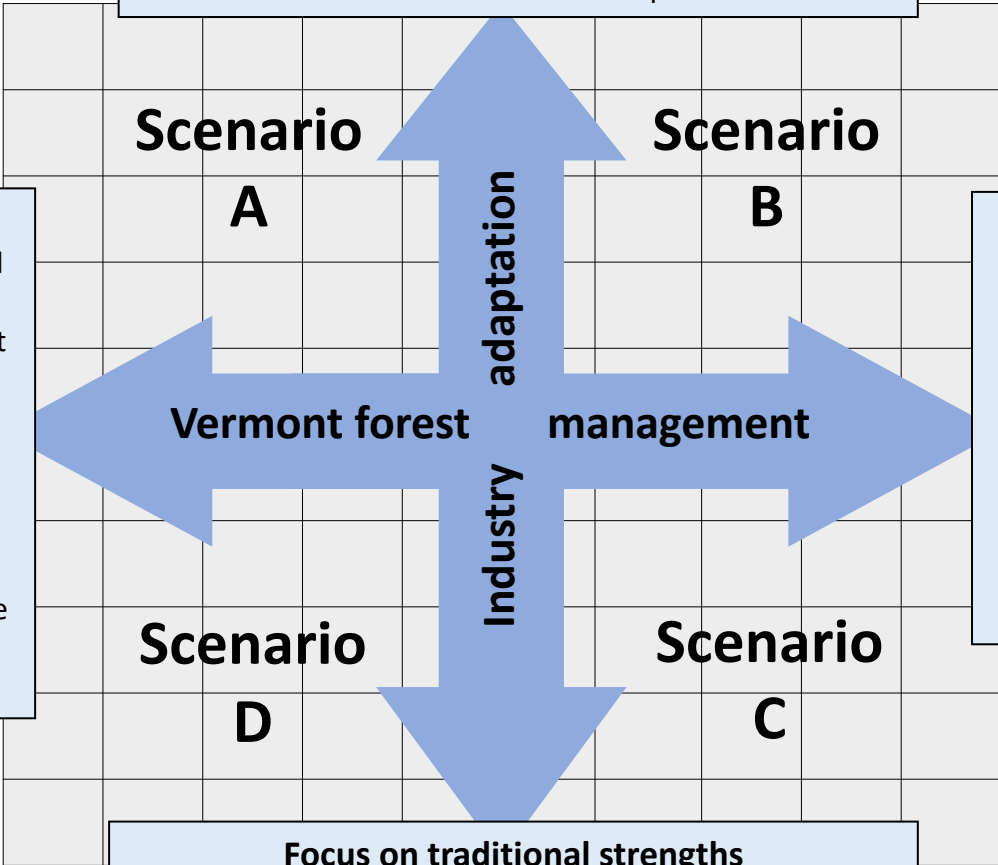
## INDUSTRY ADAPTATION

- **Technical innovation**
- **Consumer interest in wood products**
- Industrial cross-sector innovation
- Public investment in forest economy
- Supply chain dynamics and changes
- Global market pressures
- Social environmental awareness

# Plausible Scenario Matrix 2035



**Invest in proactive adaptation**  
 Proactively invest public and private resources, to build strong cross industry linkages, and spur new ideas and innovation. Build regional supply chains and promote the environmental credentials of new wood products. Boost brand awareness of VT forest products.



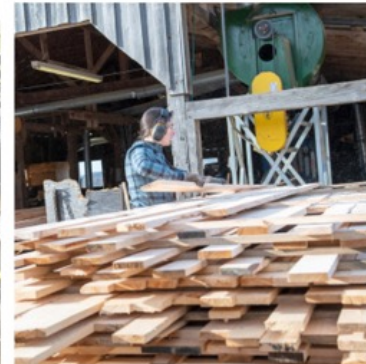
**Hands-off approach**  
 The forest landscape and land use patterns are allowed to freely follow prevailing market and economic demands, with little to reduced public policy intervention. The forest resource and landscape is allowed to evolve, driven by landholder priorities and attitudes, and is shaped by the long-term impacts of climate change.

**Intentional intervention**  
 There is intentional policy intervention, and public investment, to optimize conditions for healthy forests and products. The overarching forest management approach focuses on maintaining forests that are resilient to climate change and support a viable and diverse forest economy.

**Focus on traditional strengths**  
 Focus is on existing industry strengths and proven approaches. Allow market forces and existing forestry programs to shape the industry trajectory and investments. Publicly promote the economic value and contribution of the forest industry. Focus on the traditional forest products and workforce.



# Question & Answers

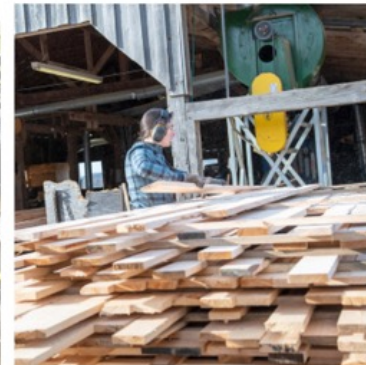


Survey will  
include profile  
questions



# VISION SURVEY AND SCENARIO HEAT MAPS

## Expected and Preferred Futures



# Vermont Forest Future

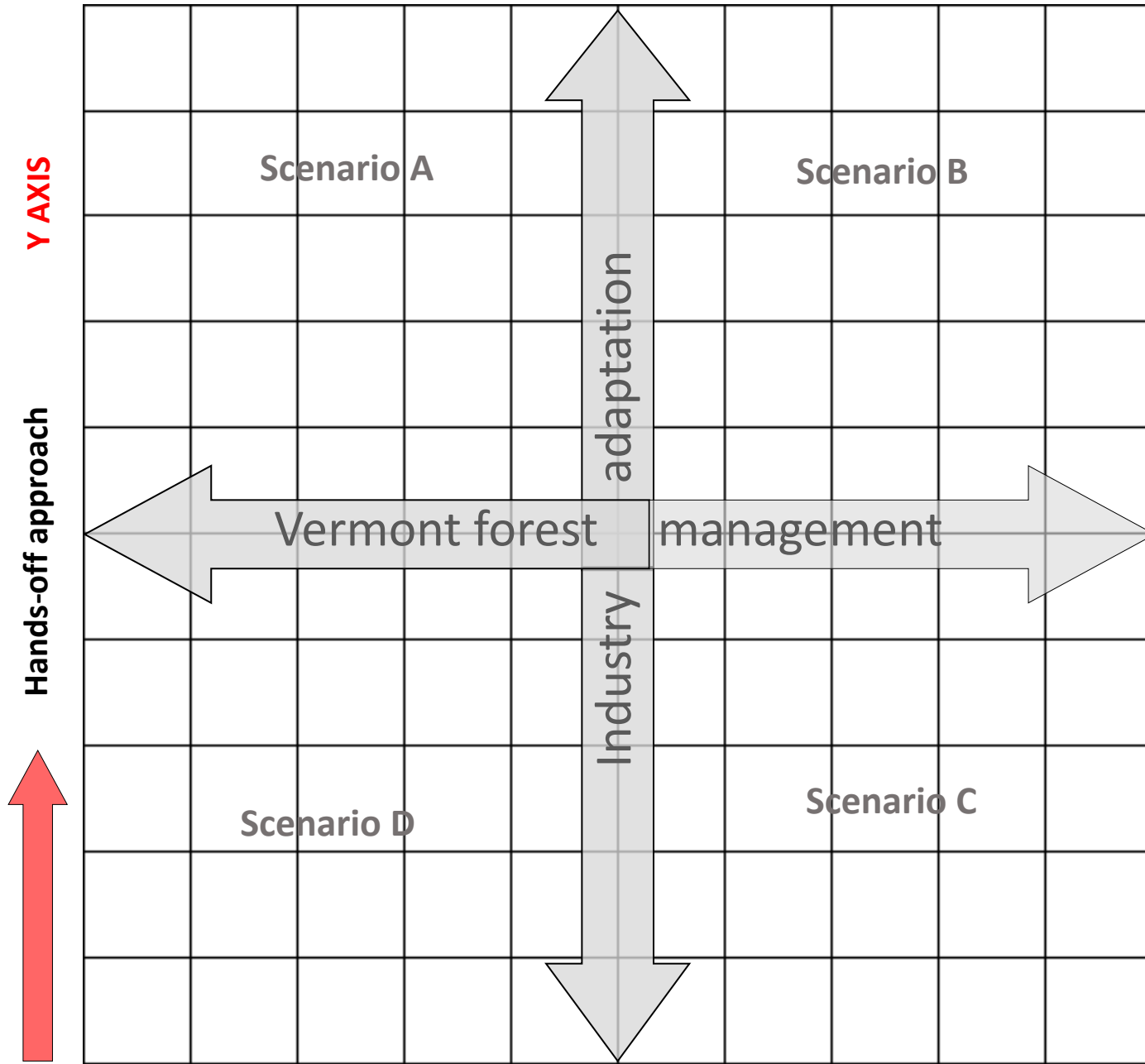
## Expected, Preferred and Least Desirable Futures Scenario Survey



Expected, Preferred and Least Desirables of the Future – What do you think?

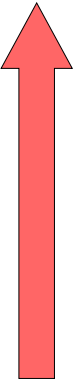
- 1. LEAST DESIRABLE FUTURE** - The Least Desirable Future is the future that you think will be most undesirable (or least optimal or least desired) future in 2035.
- 2. EXPECTED FUTURE:** The Expected Future is the future you expect most likely to eventuate by 2035, if existing trends and trajectory persists.
- 3. PREFERRED FUTURE:** The Preferred Future is the future you think is optimal and creates the best outcome for Vermont forest economy in 2035.

# Invest in proactive adaptation



Y AXIS

Hands-off approach



Focus on traditional strengths

X AXIS

Intentional intervention

Vermont Forest Future

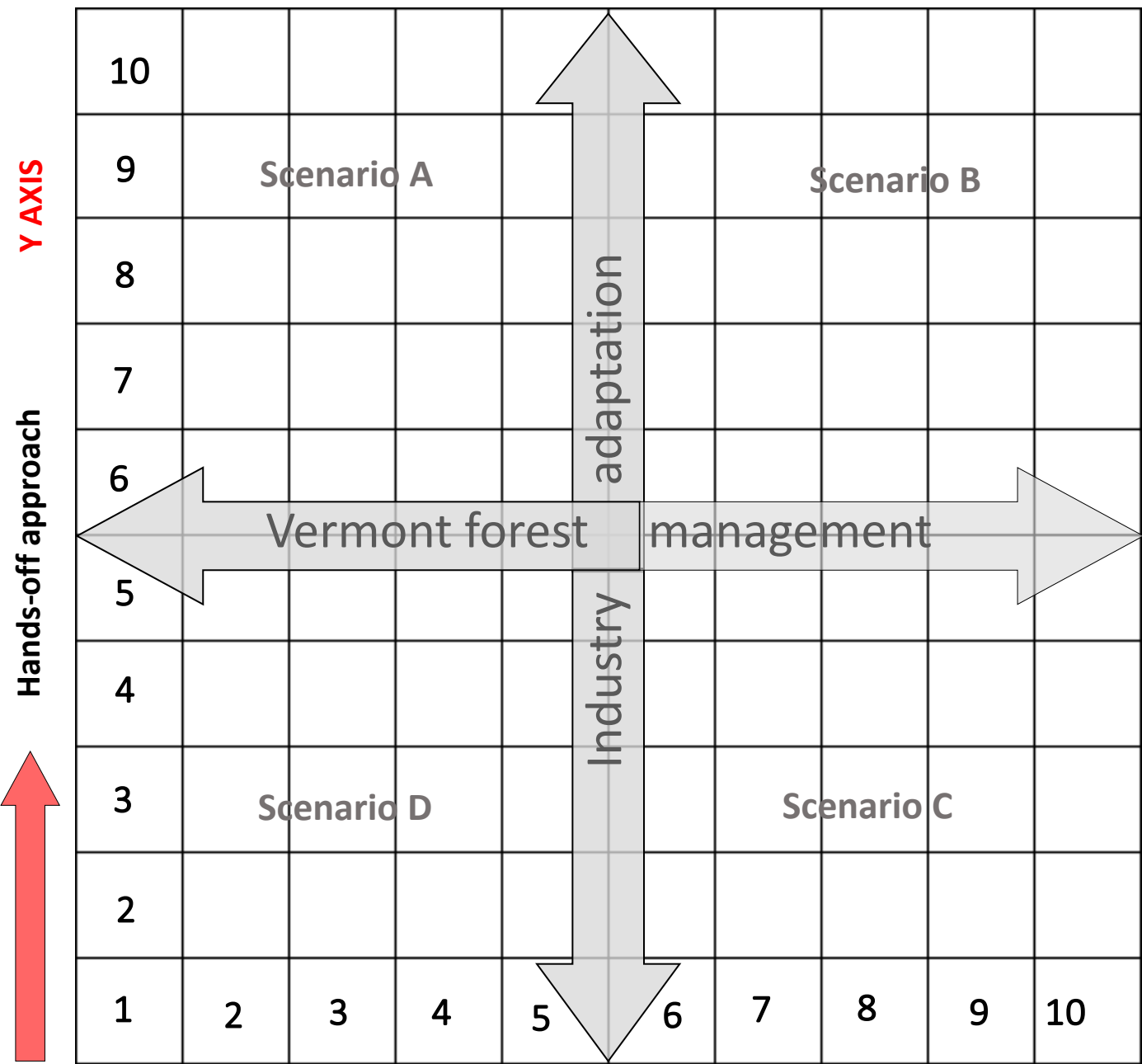
- LEAST DESIRABLE FUTURE (L)
- EXPECTED FUTURE (E)
- PREFERRED FUTURE (P)

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# Invest in proactive adaptation



Intentional intervention

Vermont Forest Future

- LEAST DESIRABLE FUTURE (L)
- EXPECTED FUTURE (E)
- PREFERRED FUTURE (P)

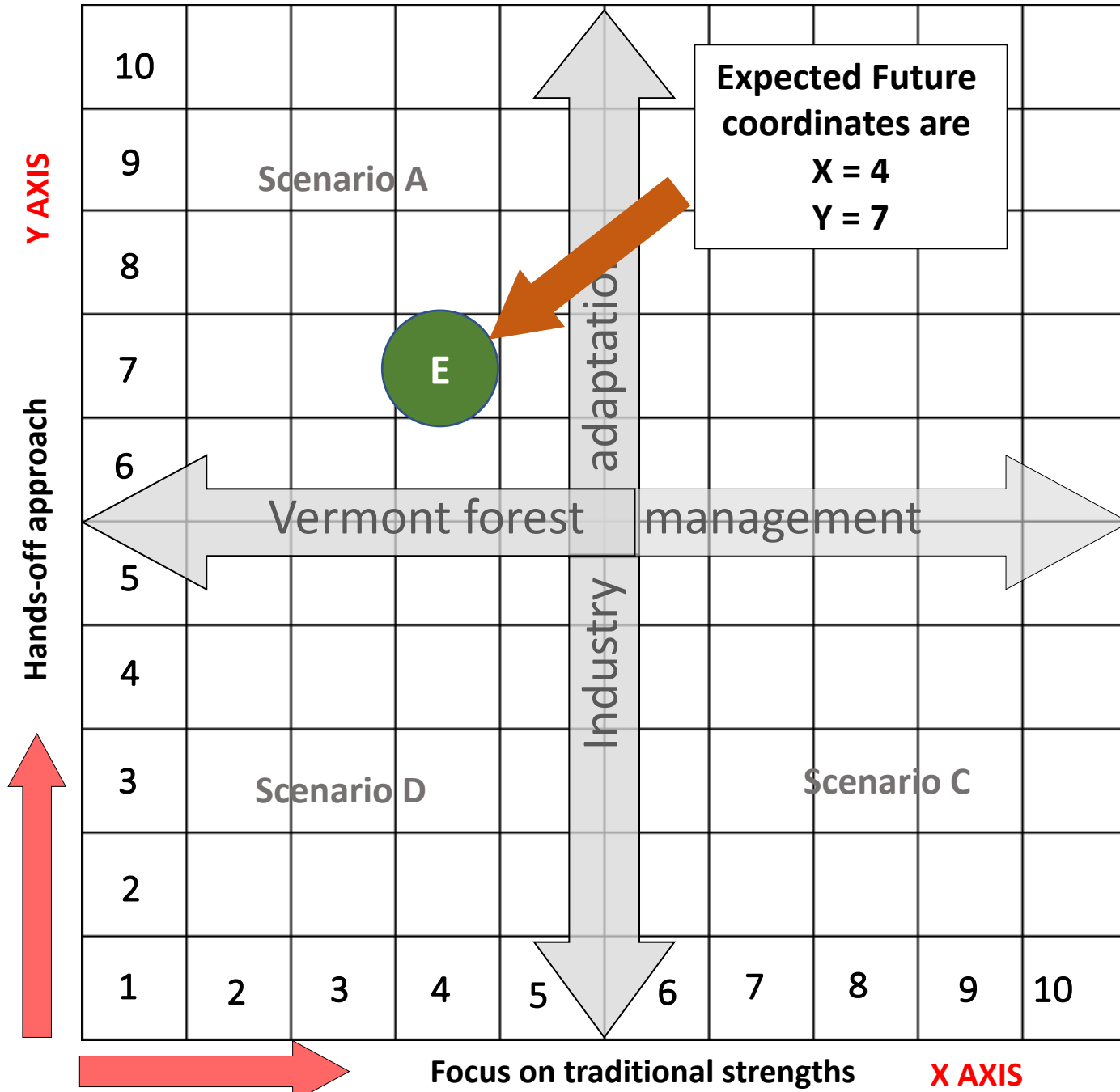
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Focus on traditional strengths X AXIS



# Invest in proactive adaptation



Intentional intervention

Vermont Forest Future

- LEAST DESIRABLE FUTURE (L)
- EXPECTED FUTURE (E)
- PREFERRED FUTURE (P)

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# Vermont Forest Future Expected, Preferred and Least Desirable Future Scenario Survey

## 7. LEAST Desirable Future (least optimal or desired future in 2035)

X-Axis (Horizontal)

Y-Axis (Vertical)

## 8. EXPECTED Future (assume current trajectory until 2035) 🗨️ 0

X-Axis (Horizontal)

Y-Axis (Vertical)

## 9. Most PREFERRED Future (most optimal or desired in 2035) 🗨️ 0

X-Axis (Horizontal)

Y-Axis (Vertical)


### LEAST DESIRABLE FUTURE -

The Least Desirable Future is the future that you think will be most undesirable (or least optimal or least desired) future in 2035.

**EXPECTED FUTURE:** The Expected Future is the future you expect most likely to eventuate by 2035, if existing trends and trajectory persists.

**PREFERRED FUTURE:** The Preferred Future is the future you think is optimal and creates the best outcome for Vermont forest economy in 2035.



**10. YOUR PICTURE of the PREFERRED FUTURE.** Please describe the Vermont forest economy in 2035, based on your preferred future. What benefits or advantages do you think it has?  0

**11. WHAT NEEDS TO HAPPEN?** What do you think needs to happen in order to make this future a reality?

 0

**What do you think?**

# Next steps



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November – February

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December - March

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Draft Recommendations

March – May

### STEP 4

#### Forest Future Strategic Roadmap

- Future Summits

Final Roadmap

June - November

Look for e-newsletter update of survey data and reports – posted to portal