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## Report on the agriculture & nature based tourism study tour : United States of America, United Kingdom & Germany, 28th August 99 to 17th September 99

Theo Nabben

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# Report on the Agriculture & Nature-based Tourism Study Tour

United States of America, United Kingdom &  
Germany

28<sup>th</sup> August 99 to 17<sup>th</sup> September 99

Hosted by the Western Australian Minister for Primary Industry's  
*Doing More with Agriculture Project* and the  
Regional Partnership Group (SouthWest).

February 17, 2000

Authors: Theo Nabben (Tour Leader)  
and  
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(South West Coordinator – Doing More with Agriculture)

*doing more with*  
**AGRICULTURE**

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## **Acknowledgments**

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Doing More With Agriculture Project and the South West Regional Partnership Group (Sustainable Rural Development Program), Agriculture Western Australia in providing funds and staff resources to allow the tour to take place.

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Roy Dart, Alistar Sims, Ian Stokes and Susan Hayes (Farm and Rural Conservation Agency) for organising the UK section of the Tour.

## **Introduction**

In late August 1999, 18 people from the South West of Western Australia travelled to the United States, United Kingdom and Germany to specifically study outstanding and innovative examples of agriculture and nature based tourism. The tour particularly focused on areas where tourism had developed due to a change in land use, or collapse of major industries (i.e. mining or forestry).

The theme for the tour was decided in late 1998 when the South West Regional Partnership Group<sup>1</sup> suggested that agri-tourism, nature-based tourism and regional branding would be suitable themes for the Doing More With Agriculture Project to pursue in the South West.

The study tour was hosted by the Doing More With Agriculture, an initiative of Monty House, Minister for Primary Industry and Fisheries and the South West Regional Partnership Group.

Background on these projects is provided in the report as they form the integral means by which tour findings are implemented.

## **Background**

Doing More With Agriculture, part of Progress Rural Western Australia, an initiative of Monty House, Minister for Primary Industries and Fisheries.

Doing More With Agriculture was launched on the South Coast in 1996, in the Central Agricultural Region in 1997, the Northern Agricultural Region in 1998 and Kimberley and Southern Rangelands and South West regions in 1999.

The project acts as a catalyst within the region to help people explore new possibilities in agriculture and expand the contribution it can make to local economies.

In total, nearly a quarter of a million dollars will be invested in encouraging local people to be more proactive and enterprising, particularly in adopting innovative approaches to marketing, value adding, diversification and regional branding and promotion.

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<sup>1</sup> Regional Partnership Groups are composed of community members or agribusiness people who set the strategic direction and provide leadership for Agriculture Western Australia's Sustainable Rural Development Program

### ***Doing More with Agriculture is about:***

- Recognising the importance of agriculture and the contribution it can, and does, make to local communities.
- Building capacity of farmers and community people to be innovative and build their own future and the direction which they will need to head to ensure sustainable rural communities and industries
- Fostering enterprising attitudes and actions, including innovative approaches to networking, marketing, value adding and diversification.

### ***How do we do this?***

This is done through running a series of study tours, local seminars, promoting success stories and case studies, and supporting bold and innovative projects. Doing More with Agriculture (DMWA) aims to provide information, experiences, resources and real examples to WA communities and industry on the full potential of agriculture.

Essentially, the project is a catalyst to increase the prosperity of rural WA through the economic strength of agriculture.

### ***What was the study tour for?***

The Agriculture and Nature Based Tourism Study tour was initiated in order to provide a catalyst for action in the South West. Particularly, it aimed to:

- Expose rural people to successful overseas initiatives in marketing, diversification, regional branding and eco-tourism.
- Support farmer and rural based groups to take innovative action and work together.
- Highlight the importance of agriculture and landuse planning to local communities and economies.

### ***Tour Participants***

Eighteen people from across the South West region were on the tour, including Theo Nabben (Tour Leader) and Ross George (AgWest South West Sustainable Rural Development Program Manager). Many of the tour participants were in key decision making roles within local government and well placed to follow through with implementation on their return to Western Australia. Also on the tour were farmers showing some initiative or potential in terms of agricultural tourism. (See list in Appendix 1 for names and details of tour participants).



Tour participants: (left to right) Theo Nabben, Rob Gates, Nick Oaks, Barbara Maidment, Michelle Sherwood, Carolyn Hull, Shelley Pike, Tony Jenour, Robyn Bowles, David Chidlow, Pauline Vukelic, Ross George, Glyn Yates, (Front row, left to right) Ann Lyster and Deb Dixon. Missing from photo: Owen Grieve, Keith Liddelow and Dina Barrett-Lennard.

### **Scope of this report**

This report describes the broad themes of the study tour and lessons learned. Implementation of the lessons learnt while on this tour will be an ongoing process both in the short term and over a longer time frame. In order to facilitate on-the-ground implementation, a series of post tour meetings are being held to provide a catalyst to action.

## Themes of the report

Participants have brought home a wide range of information, experiences and ideas to Western Australia. Each will utilise them in different ways according to their areas of expertise and interest.

Though the focus of the tour was agricultural and nature based tourism, it became evident that this topic is inextricably linked to other issues currently facing the South West. In many cases tourism provides a vital tool for communicating agricultural or nature based issues to the wider, non-rural population.

In addition, the tour reinforced much of participants' current knowledge about world best practice, and provided them with the motivation to aim to this level. It is also important to note that in some cases, Western Australia is ahead of the examples viewed on the tour in areas such as planning policy and farm tourism organisation.

However, on an overview, six recurring themes were identified on tour as keys to a vibrant economy in the South West. This report is divided into each of these themes and provides an insight into lessons learnt while overseas, and how these might be adapted to Australia. The themes identified were:

1. Agri-tourism
2. Marketing
3. Restructuring Rural Communities – Building on Natural Resource Management
4. Land use planning
5. Developing improved linkages with Higher Education
6. Leadership

A copy of key contacts (including those mentioned in the case studies) and the itinerary are included in Appendices 3 and 4.



## 1. Agri -Tourism

Agri-tourism in this report is defined broadly and includes heritage tourism, farm trails, farmers' markets, community supported agriculture (farmers selling direct to households), Bed & Breakfast accommodation, and agricultural festivals as well as the more traditional farm attractions and farm stay operations. Tourism is not the panacea to fix all ills in our rural communities and should be seen as part of a broad economic base.

Numerous examples of agri-tourism were seen in both the USA and UK. These include: Westside Farms, Doughety Ranch, Laguna Farm and Chileno Valley in California. Numerous B&Bs and agricultural related festivals and attractions (i.e. Westside farms, Cranberry Festival, Bayfield Applefest), Down a Country Lane (farm tours), Trek and Trail, Sparta Bike Trail, numerous trails in Wisconsin and Farmers' Markets were visited in both US states. Odds and Ray's Farms, Dunkerton's Cider, Millets Farm Shop and the Farm Holiday Bureau and the Ludlow Food Festival and Ironbridge Gorge were visited in the UK (see Appendix 4 for details).

It was also noted that Australia has some agri-tourism examples that are as good, or better than those seen overseas.

### *What we saw*

- Local communities with a vision for tourism growth and development, and an understanding of what style of tourism will meet their specific needs.
- Tourist operators who were very aware of the value of the Internet and advertising. Communities and individuals made great use of the Internet and had smart ideas to get valuable free advertising. Importantly, the value of this advertising was recorded. Even a "mediocre" eco-tourism site generated good business by advertising via the Internet. Internet use in the USA was much more significant than UK or Europe.
- Regional visitor centres which were professional and clever at marketing/packaging.
- Market niches can be developed if you have your research right. Look for something a little different, such as the Amish lifestyle or encourage producers to think laterally i.e. Cranberry Festival. The USA also showed examples of using community groups such as seniors in Mineral Point Wisconsin to develop a certain niche. (i.e. tours on architectural heritage).
- The USA particularly showed that to be successful, you have to make the most of what you have got, particularly in order to develop trails etc.
- There were many good examples of people and agencies working together for everyone's benefit. Large projects such as the Wisconsin Travel and Information Centres were achieved through groups working together, with Bayfield (run by Carol De Mars) exemplified as an effective small local tourist bureau. Warrens Cranberry Festival was a wonderful example of a town working together.
- Great Lakes Visitor Information Centre showed a very effective process for inter-agency cooperation in building a top class attraction.
- People in the US and UK are struggling with fledgling businesses despite some of those we visited having populations of 8 million on the door step! This provided a realistic framework within which to measure our own efforts in Western Australia.

### *Lessons learnt*

- Agri-tourism is part of the total tourism package or experience for rural areas, often complementing icons such as wineries or other main attractions. Throughout the USA and UK the incorporation of agritourism operations within larger tourism promotions or associations reflected the view that “the whole tourism package” must work together to bring benefits to rural areas.
- In both the USA and UK agritourism is supported by various bodies (i.e. the Small Farm Centre, University Extension, or the Farm and Rural Conservation Authority). For instance, in the UK the National Farm Attractions Network Newsletter gives handy hints on surviving in the farm attractions market, advice on training courses and Internet marketing for schools (i.e. accessing the school market). Support for agritourism in its early stages may be useful to help the fledgling industry develop in Western Australia.
- Successful examples of agritourism showed that it was necessary to sometimes take risks, and also be prepared to fail. Many small entrepreneurs tried making agritourism their sole income. After failing (which they were open about), they had to resort to some supplementary off farm income.
- Staff training was a key factor in the success of some organisations, as they presented a professional and consistent image. The most memorable experiences were where the staff were also passionate about their job or subject.
- A willingness to pay characterised American communities that often raised taxation levies in order to finance local initiatives. By raising taxes, it meant that locals controlled allocation of their own funds. Many small communities of similar size to those in WA were able to achieve significant local benefits by applying funds to targeted local marketing and promotion projects. The study tour also saw examples of local festivals returning funds to community projects.
- Key elements of successful tourism ventures were:
  - Do your homework first.
  - Set goals.
  - Build on assets and existing resources.
  - Be adventurous.
  - Cater to niche markets.
- Work with others for employment and promotion.
- It was clearly demonstrated that tourism is not a panacea and should be viewed as “just another industry.”
- Agricultural tourism in many cases was a sideline for another enterprise.
- Agricultural tourism has an important role to play in educating people in urban areas about the value of agriculture and raising the profile of a country lifestyle.

### ***Suggested actions:***

- The WA Tourism Commission specifically devotes resources to supporting agritourism in the South West.
- Doing More with Agriculture will be encouraging further interest and knowledge dissemination on agritourism.
- Investigate the potential of Farmers' Markets, particularly researching the role of local government authorities and interpretations of Health Department regulations.
- Promotion of West Australian agricultural products. Facilitate farmers to meet and promote their goods in regional cities and Perth, as exemplified by Selfridges in London (obviously on a smaller scale.)
- Study and imitate the marketing tactics of B&B's overseas. They work together and promote to the industry through collaboration, for example by inviting travel writers.
- Conservation easements, though not an example of tourism, can be a driving factor for tourism. Conservation easements may be a good substitute for subdivisions and encourage farmers to diversify into tourism/agricultural type businesses rather than leaving the land altogether.
- Development of trails. Western Australia has amazing natural scenery and potential for trails, which should be explored further.
- Development of Bibbulmun Track by linking it to Agri-tourism ventures along its way. The Bibbulmun Track has already been a great success, without towns along the way cashing in on its name and thoroughfare. Farmers bordering Bibbulmun Track may develop their own track in conjunction with a B&B or coffee house. (Similar to Ray's Farm).
- Investigate and promote adventure tourism. Sea Kayaking was an excellent example of adventure based tourism and the South West has many areas where such activities could take place.

### ***Case Study: Warrens Cranberry Festival, Wisconsin, USA***

Contact: Nodji c/- Connie Loden

Cranberry Festival has developed from a \$1,600 budget 27 years ago to \$130,000 today. It highlighted what community of 400 can achieve with a niche market (100,000 visitors over 3 days). Key elements of success:

- Building on uniqueness.
- Community support activity by direct financial input.
- Only big fund-raiser which attracts "out of town" dollars.
- Quality control.
- Fun for organisers.
- Continual promotion at surrounding fairs and events.
- Confirms important role of women initiating and driving community activities.
- Good communication.
- Methods of maintaining enthusiasm were important, as was clear delegation of responsibilities.
- Support cemented by direct returns to community.

***Case study:***

***Marketing Agritourism - Green County & Southern Wisconsin, USA***

Contact: Michael Jones

Even very small rural communities (such as Green County) made an all out effort to market the rural nature of their community. Key elements of success were:

- Important to have sense of community/sense of place, as well as being clear about the type of clients they want.
- Focused on heritage (their 'big gun'), Agritourism and historical aspect were seen as one and the same – a way to keep their towns alive.
- Good organisation - they evaluate and document everything.
- Importance of creativity and professional support in order to “step up” to the next tourism level.
- Very creative ideas, i.e. using school children and youth. A ‘regional mermaid’ was particularly effective use of local media.
- Green County worked as a community; even though there were many different groups - all had the same big picture and goal in mind, so efforts were focused on one direction.
- Made great use of university - it was involved on a range of levels.

## **2. Marketing**

Marketing can play a vital role in enhancing returns for farmers and rural communities by generating alternative or higher value markets. A component of marketing viewed while overseas was Regional Branding and Promotion.

The group was exposed to a range of marketing techniques whilst overseas. In California, regional branding case studies were studied with site visits at Mendocino and Sonoma. In Wisconsin, seminars and case studies on agritourism marketing were showcased in Green County, and marketing projects undertaken by Iron County and Tourism Bureaus were also viewed. The Farm Holiday Bureau and Marches Country Side Association in the United Kingdom also provided marketing case studies.

Individual entrepreneurs in both the United States and the United Kingdom generally displayed superior marketing techniques such as client identification, services for niche markets, evaluations, and innovation in marketing and promoting their product or region. Rural Heritage was a strong focus for marketing campaigns in Wisconsin and the United Kingdom. Also evident throughout the United States were links to the “good old (rural) days” and the potential this raised for further interest in agritourism.

Both marketing and regional branding can play important educational messages, and develop the appreciation of the wider community of the value of agriculture, nature based tourism and rural communities.

It was also evident throughout the USA and UK that food quality and food safety issues were vital, particularly for producers who aim for niche markets as opposed to volume supply. In the USA there were indications that farming may move towards a ‘biologically integrated farming system’ midway between conventional farming and organic farming. This also presents market opportunities for West Australian produce.

The use of Information Technology as a marketing mechanism was interesting and very applicable to WA due to our isolation.

### ***What we saw***

- **Regional Branding**  
In California, Michael Dimock of Sunflower Strategies and Ken Silveira of Select Sonoma and the Mendocino County Promotional Alliance (see case studies in this section) demonstrated the importance of regional branding. They highlighted the community’s ability to produce, the need for commitment to concept, importance of identification of niche markets, and having an objectively managed organisation. Cooperation among regions in both California and Wisconsin at different levels revealed some real success stories, and lessons for WA communities. Cooperation amongst regions for effective marketing was also demonstrated in the United Kingdom with the Marches Countryside Attractions Group (see case studies in this section).

- **Farmers' Markets**  
 These markets were for farmers who operated out of specifically built structures. As the farmers controlled these markets, they ensured dollar benefits went to local communities. However, unlike Australia where markets have a connotation of "bargains", produce was certified by a local authority/Department of Agriculture and therefore of a certain quality. Farmers' Markets also provided important links between the consumer and the farmer, with consumers appreciating the farmer being the point of contact for sales. The farmers' markets varied from highly organised and large events (San Francisco) to very small events (Wisconsin). In the United Kingdom Farm Shops also fulfill the role of strengthening the links between town and farm people.
- **Global Marketing**  
 A visit to Selfridges Food Hall coincided with a planned two-week promotion of Western Australian produce where all Selfridges Stores promoted and sold WA food.  
 This clearly demonstrated to the study tour group that Western Australia can provide products to the highest standard in the world, but we need to market them accordingly and in a cooperative manner. The era of Global Marketing was very evident through the widespread use of the Internet.

### ***Lessons learnt***

- Marketing is a means to reconstruct links between farmer and consumer, which are vital for the future of agriculture
- Regional Branding is a method of effectively creating a "niche" market for a particular product that can be cleverly linked to aspects of tourism. Focusing on the local or regional uniqueness, and nostalgia for rural life is a key aspect in Regional Branding. Examples such as Green County and Sonoma Select in the USA, and Dunkerton's Cider in the UK have some applicability to local efforts at regional branding such as Harvey Fresh/Beef, Plantagent Prime, and in the Swan River Valley.
- Multiple strategies are an important element of successful marketing. For example, use of web site, farm tours, familiarisation tours, road shows directed at key markets, and festivals in slower times of year initiated to attract tourists or a specific clientele.
- Cooperative marketing involving a number of players in the supply chain allows each player to focus on their specific role, while also having a bigger picture to work on.
- The Internet can play a huge role in marketing. In the US small businesses such as B&Bs have 40% of business is coming through the Internet. This was evident in the UK but not to the same extent.

### *Suggested actions*

- Audit on current status of marketing/regional branding projects currently being implemented by government organisations. Encourage the sharing of this information between projects, and active partnering.
- The need to regionally combine our efforts when competing nationally or internationally.
- Develop and enhance knowledge and understanding of farmers in the South West on the importance of marketing and regional branding.
- Promote the value and use of information technology (particularly the Internet) to southwest businesses. Facilitate the use of Bush NET funds to assist this.
- Consider developing a strategic alliance with Mendocino County to share their experience in regional branding. (Such an alliance would also help in other aspects of community and economic development – see section on Restructuring Rural Communities.)
- Investigate the potential of linking with the Sonoma-Provence exchange as a way to brand the South West with internationally recognised regions.

## ***Case Study - Mendocino County Promotional Alliance<sup>2</sup>, California, USA***

Contact: Michael Dimock or Glen McGourty

The Mendocino County Promotional Alliance (MCPA) is a successful case study in regional branding and marketing. In the early 1990s, Mendocino was suffering from a decline in a range of traditional industries. Tourism infrastructure was underused and there was a clear need to extend the “tourism shoulder”.

MCPA is a private non profit business association consisting of five organisations forming a public-private alliance. It is made up of wineries, accommodation, farm bureau (i.e. farmer organisations), chambers and visitors bureaus and specific tourist destinations. The aim is to pool resources to promote the agricultural image of the county. A bed tax, private sector donations, and in-kind support raise funds for the alliance. It has a budget of US\$280,000 per year headed towards \$500,000 and employs professional staff.

### *Some lessons from MCPA:*

- Importance of private-public partnerships
- Use of multiple strategies in marketing. For example, use of a Website, farm tours, familiarisation tours, Mendocino Bounty Road Show directed at key markets, festivals in slack times of the year (i.e. Sheep and crab festivals were initiated to draw tourists)
- Build on strengths.
- MCPA promoting itself as a wine colony with a market focus as opposed to a production focus wine area. They use the least amount of pesticides possible, and as such there is a significant amount of certified organic production coming from the County that has captured a “clean green” image.

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<sup>2</sup> Note contact details for those mentioned in case studies are in Appendix 3.



### ***Case Study - Fiesta Markets and Sonoma Select, California, USA***

Contact: Michael Dimock or Ken Silveira.

This was a good demonstration of regional branding at consumer level, featuring a high-class supermarket (Fiesta Markets has 2 supermarkets) carrying a wide choice of fresh quality items. They were a successful, well-kept and profitable small supermarket chain. Eco-labelling and regional branding (with Sonoma Made and Sonoma Grown labels) helped tap niche markets which were looking for uniqueness as a reaction to the “retail desert” of generic products and stores. Fiesta Markets are an active business in the Select Sonoma Campaign.

Select Sonoma is a non profit corporation whose mission is to use marketing (among other things) to help Sonoma County agriculture to be more successful. It has 325 members (155 grower-processors and 170 associates, made up from generally allied industries). It has an annual budget of \$200,00 and also receives fees from bed taxes from tourist accommodations, membership fees and fees for service.

Some projects include cooperation with farm trails, a retail promotions program, certification logo stickers, consumer education, collaborative marketing project, industry education (i.e. seminars on consumer trends, strategic and market planning. Another marketing tool is the Sonoma-Provence Exchange which is a “sister region” approach and an example of regional branding at a global scale. This group is very effective in the North Bay area of San Francisco (it is having trouble reaching beyond this area) and is now developing allies by linking with the Sonoma Wineries Association.

Key elements of success:

- Size and professionalism of both organisations
- Close relationship with local producers.
- Freshness and choice.
- Commitment to promoting local produce.
- Sonoma Made/Sonoma Grown produce.
- Commitment to organic produce.
- Identification of niche market
- Another key of the “Select Sonoma” success was the involvement of the Fiesta Supermarket group and other businesses which complemented the supplier/farmer side of the organisation.

### ***Case Study - Rays Farm Country Matters, Bridgnorth, UK***

Contact: Frank Cartwright

Rays Farm Country Matters, near Bridgnorth (Shropshire) in the United Kingdom was a great example of how a niche market can be created through persistence, creativity and flair. The owner did not have a farming background, but had entrepreneurial skills that assisted in the operation of the small farm which specialising in birds and farm animals, including a unique Vietnamese pig (which helped attract a lot of free publicity) and associated farm trail. The enterprise was a member of Marches Countryside Attractions Association, a regional tourism group. This group assisted in obtaining valuable EEC grants and promoted the Farm as part of a series of regional attractions. Key elements of success:

- Persistence
- Non agriculture money in setting up the business
- European Community funding input.
- Joint marketing, part of a wider professional association.
- Professionalism of operation in marketing and promotion
- Good interaction/communication with local community.

This model illustrated how important cooperative marketing is, and how effectively grant and funding administration can be done through a regional body. An ability to identify and adapt to changing trends, as indicated through customer surveys, were also key factors in the success of the business.

Despite the fact that three consultants told Ray not to go ahead with the project he succeeded, in part due to his entrepreneurial ability, the cooperative group support from the Marches Countryside Association and subsidies through the European Community.

The Marches Countryside Association is a collection of 30 business operating in the Marches region that jointly promote their services in Herefordshire and Shropshire. Businesses range from Herb farms, accommodation, several farm attractions, heritage sites and museums, vineyards and the like.

### **3. Restructuring Rural Communities**

#### **– Building on Natural Resource Management**

The timeliness of the Study Tour was important for the South West Region, which during 1999 underwent a number of changes due to the Regional Forest Agreement, changes in forest management plans and closure of some large companies. There were a large number of changes to the South West economic base (i.e. forestry restructure, dairy deregulation, closure of vegetable processing plants, and power generation and mining changes over recent years.). The region is currently uncertain about their future, and questioning where their future economic security will come from. A crucial role of study tour participants was to visit overseas towns that had experienced changes to their industry base and how they have survived. Of particular importance was to study the continuing, but changing role of agriculture and also tourism.

#### *What we saw*

A number of communities that had undergone considerable restructure due to a decline in their traditional primary industries. These included the Dodgeville community in Wisconsin and the Mendocino, Fort Bragg and County Del Norte communities in Northern California. Despite large-scale downs of industries such as forestry, mining, fishing and agriculture these communities had “survived”.

In communities where the timber industry had been large employers, only 30% of displaced timber workers have gained other employment in the same areas. Ten years ago, when the timber industry restructures occurred in California, timber workers moved to Montana where the logging was continuing. The study tour was told that restriction was now being applied in Montana and these loggers “had nowhere else to go”.

A detailed discussion on USA government efforts to assist economic restructuring in forestry communities was presented at a seminar in San Francisco and is detailed in Appendix 5.

### *Lessons learnt*

- Government and government organisations have an important role in ensuring futures for communities, particularly supporting coordinated regional and sub regional strategies. Long-term strategies should be encouraged.
- It is vital that communities work together cohesively and positively for real change, with broad-based community support on issues such as sustainable forest management.
- Communities need to have a genuine desire to maintain economic base and balance environmental concerns. Environmental concerns and appropriate standards were also a developing/mainstream issue overseas.
- Effective and ongoing planning can help to ease uncertainties related to change, but clear guidelines are vital. In the US, proven effective ways of meeting most of the stakeholders' needs were showcased. Actions need to be well planned and supported with wide community acceptance. Clear dispute resolution guidelines provided the foundation for a win-win situation
- We need to get the polarised parties to the table regarding the forest debate to find some common ground.
- A community's attitude is a vital determinant of whether it will survive or not.

We need to spread the message of the sustainability of timber harvesting as a renewable resource. We also need to understand that traditional farming practices will come under increasing scrutiny as the community becomes more urbanised and lacks the understanding of farming. The USA and UK have lost the links and Australia is following this pattern. The link between rural and urban communities is very important, and an urban understanding of what the issues are is vital.

The current forest debate illustrates this clearly where the urban community appears to have little regard for the impact of changes on the rural communities. This insensitivity may be as a result of loss of touch with rural communities. Alternatively, their insensitivity could be due to the changes and job losses that have taken in urban areas compounded by significant changes in labour markets and employment practices in the past ten years. Agritourism has a vital role to play in maintaining the links between urban and rural people.

### ***Suggested actions***

- Seek undertakings from Government to maintain and enhance Government services.
- Develop links/relationships that integrate economic opportunities across forest regions.
- Fast track value adding opportunities that add value to existing resources and level of new opportunities.
- Attract additional education/skills development to areas that complement existing economic base (e.g. timber technology, aquaculture, and horticulture).
- Paint picture of sensible, sustainable forest management practices and good land management to ensure clean, green image in market.
- Continue on-going education of community at all levels to facilitate an end to conflict
- Use of good processes which get the polarised parties to the table and provide the necessary stimulus and support for on-going implementation
- Provide the community with the information to understand forest and agricultural issues
- We need to dramatically improve education to ensure community is making decisions based on facts not misinformation.

### ***Case Study: Dodgeville, Wisconsin, USA***

Contact: Jim McCaulley, Mayor

The Dodgeville community has had a number of transitions in their main enterprise from mining, agriculture, and fishing to more urban base with agricultural tourism. Downward returns from farming meant that a need was generated for off farm jobs, combined with pressure from the urban sprawl on farmers to subdivide to make lifestyle blocks. Dodgeville was a cohesive community, partnering and working together on a range of projects, including “A community event to recognise agriculture’s contributions to the community.” Another successful event was an initiative to preserve an important heritage aspect of Wisconsin with Barns NOW (Network of Wisconsin).

Key elements of success:

- Strong commitment to place, and willingness to participate.
- Recognition of agriculture’s contribution to local community.
- Agriculture seen as a buffer zone between urban and industry.
- Nostalgia for rural life can be an asset for rural communities.
- Government departments worked together on those issues where they could identify common ground.

***Case Study:***

***Fort Bragg (Mendocino County), and Reyes Point, ( Marin County), California USA***

Contact: Greg Giusti/ John Del Losso

These case studies illustrate a number of excellent examples of land use and community planning. In both cases the people had a genuine desire to maintain an economic base while balancing environmental concerns.

Fort Bragg, a traditional forestry area, had suffered major declines in traditional industries such as timber. They maintained their base through a number of different initiatives and funded a small-scale revitalisation initiative via incentives paid from a revolving loan fund (which does not compete with private banks).

In order to finance services at Fort Bragg, the town applied a land tax based on unimproved value. A bed tax between 2% and 8% is applied and a \$10-\$15 levy is applied per lot to fund fire fighting equipment etc. Fort Bragg was now investigating aquaculture as a viable alternative and working towards a diverse economic base comprising forestry, tourism, cottage industries and larger industry.

There was a strong understanding of the importance of maintaining the agricultural base in the USA. At Point Reyes (which is in Marin County surrounding the San Francisco Bay area) farms were actually part of the National Park. However, as the local community assisted in the management of the park, they were involved in park planning and also providing services such as homestays.

*Key elements of success:*

- Recognition of life beyond traditional industries and a shared vision
- Leadership which can encourage others to take the initiative, a willingness to try new ideas and risk failure, initiative
- Government agencies and councils need to work together.
- If the community feels that they DO have real input, they will participate.
- Communities see that to be vibrant, they need to support initiatives themselves.

#### 4. Land use planning

The priority should be planning policies that focus on the long-term implications of land use for agricultural production. This has many flow-on considerations, including the maintenance of rural vistas for tourism, and providing financial alternatives for the retention of agricultural land.

In both the US and UK they have had greenbelts around cities for some time. The urban community supported these not because they wanted to maintain agricultural production, but because they wanted open space around them. It appeared that if we try to maintain the farmlands based on agricultural production it wouldn't get as strong support from the urban community. Rather, we need to promote the concept of open space or rural aesthetic to urban communities. This in turn, provides us with the opportunity to keep the city folk in touch with where their food comes from as secondary, and subtler, message.

##### *What we saw*

- In the USA each local county is responsible for its land use planning and therefore we saw a great diversity of approaches (or lack of them) even within each State. In the UK planning regulations were much tighter.
- The Wisconsin Dells.  
About 150 years ago, this was an attractive area full of natural scenic value and of cultural significance to the local Indian people. It has since been developed into a highly concentrated area of Disneyland-style attractions. Thus, some of the group felt the area was 'out of control', while others saw it as catering for a specific type of visitor. Many nature-based developers wish to avoid this style of development in Australia, but it must be remembered that 3 million visitors come to this area annually and the money earned by operators has allowed the provision of significant community services. Planners in the area and the community have worked together to contain the development so that portions of the Dells with high scenic value, are preserved. Wisconsin Dells provided important lessons about land planning and community interaction issues. Whether we like the style or not, across the world there is demand for this style of development, therefore, it is a matter of how you plan for it and where you put it.
- Marin Agricultural Land Trust (MALT). This was one of the most successful examples of protecting agricultural land via the use of land use easements. MALT's purpose is to help keep land in agriculture by offering landowners a way to capitalise on the increased value of their property without having to sell or subsidise. Agricultural conservation easements are purchased from landowners and specific restrictions on the amount and type of development are set forth in a legal document. More detailed information on MALT is included in Appendix 6.
- Sonoma County Agriculture showed how incorporating conservation easements can provide a good model for safekeeping of agricultural land against the urban sprawl, and as a consequence protecting rural towns.
- Land use planning was an important local issue, particularly in the UK. Businesses illustrated the importance of having the local planners "on side", even if they didn't really understand the needs of a farm business seeking to diversify. In some cases very successful businesses had to fight the local planners on every issue, in other cases they were able to make incremental changes because their business expanded more rapidly than the planning system could deal with.



### ***Lessons learnt***

- An exchange of information between planners in Western Australia and some in the USA (i.e. MALT and Mercer County) would be useful for both parties. In particular Agriculture Western Australia's Land Use Planning Project would benefit from such an exchange.
- There is a strong need to create incentives for farmers to retain agricultural land, with pressures such as urban encroachment and financial considerations providing strong motivation for them to leave.
- During the study tour, participants were able to see both good and bad examples of land use planning. Through this, it is imperative that Australia aspires to best practice in this area.
- In some cases, the only way to retain agricultural land is by providing financial alternatives, which can be funded through a self-imposed county tax to pay for conservation easements.
- Conservation easements help to develop the relationship between city and rural people through shared risks and enhanced understanding of mutual problems.
- Environmentalists focused on city generated problems which lead to support for rural easements.
- USA and UK have managed to implement schemes such as Greenbelt and MALT because there is either strong local or political support from farmers, government and politicians.

### ***Suggested actions***

- Increased promotion of the importance of land use planning within rural communities - to all stakeholders.
- More community involvement in the decision making process (community based planning process).
- Stakeholder representation on State Planning Commission, emphasising that there should be focus on long-term strategic role
- Improved processes. Planning strategies need to be revisited more regularly.
- The aim should be to have a process that maintains the community and local government's support for the plan after it is finalised and reach for consensus within a time frame.
- Initiate review of planning responsibilities of various bodies.
- We need change in processes to ensure community involvement. Planners generally don't help by complicating the issues with laws, schemes, policies and strategies.
- Conservation easements to be developed with trails in mind to allow access, while also protecting the surrounding environments.

***Case Study: Stonnybrook /Suffolk County, Long Island, New York, USA***

Contact: Joe Gergela

This case study demonstrated landuse planning strategies aimed to preserve agricultural land. The conservation easement concept in United States was pioneered in these counties, and now implemented in 26 States, (including the Marin Agricultural Land Trust.) More detailed information on conservation easements is included in Appendix 5.

Key elements of success:

- Recognition of need to preserve agricultural land with activity.
- Tax system modified to allow development right purchases.
- Established conservation easement model.
- Legislative changes in support of agricultural land conservation.
- Effective lobbying at policy level.
- Using extension service support.
- Need to educate urban dweller on urban versus agriculture activities and impact on environment.
- 'Value of agriculture' PR campaign.
- Community consultation, cooperation with government agencies.

***Case study:***

***Mercer community planning, Great Lakes District, Wisconsin USA***

Contact: Cathy Techtmann

This community was threatened by increased commercialisation of their lakes area following the submission of a landowner to put 100 lots around a 20 hectare lake. The community was concerned about a loss of the “quality experience”. The planning process has been in place for 3 years, with the community seeing the problem and over 80% of both locals and the weekenders wanting to preserve the quality of the lifestyle. The process involved the community at all stages, and continues to involve them.

*Key elements of success:*

- involving the community at all times and empowering them,
- educating them and making the process fun.

*The key steps in the processes were:*

1. Understand the feel on the street
2. Involve the people
3. Clarify the issue
4. Gain knowledge
5. Explore the options
6. Develop strategies to resolve the issues
7. “Try on” the strategies with the community
8. Implement and monitor the plan.

*Lessons Learnt:*

- Community consultation, cooperation with government agencies
- Involve the people in both the assessment of the issue
- Finding a solution and implementing the plan
- Enjoy yourself
- Gain knowledge throughout the process
- Generate understanding in the broad community through articles, press releases etc
- Do not stop the processes once the plan is finished. Keep it going, developing and evolving and keep all of the community involved in this process.

## **5. Developing improved linkages with Higher Education**

Throughout the entire Agriculture and Nature Based study tour the value of higher education and utilisation of people with specialist skills in rural community development was highlighted. Most small rural communities in the USA we saw had the services of a University Extension Officer(s) or their own rural development officer. Universities and higher education provide leadership and entrepreneurship for rural communities.

The United States has developed a Cooperative Extension Service through its land-grant University System that is entirely different to that in Australia. Extension in the United States sees local government, state and federal agencies and the universities working together.

Australia needs to deal with the tall poppy syndrome and the general denigration of people with university educations or who display leadership or innovation as being impractical. Compared to USA, Western Australia has almost no placements of Cooperative Extension style officers in rural communities. Rather, in the South West we tend to be regionally focussed with a concentration of university people and project activities in Bunbury.

However, higher education itself was not the sole distinguishing factor of the support provided to these small communities. Many would have a rural development officer or marketing officer who had broad skills in group work/facilitation, entrepreneurial skills and specialist skills. In Western Australia, we tend to have people working in communities part-time with some of these skills – however, we do not as a rule specifically fund staff with the broad mix of skills who can undertake these multiple developmental roles. For instance communities may have the services of a Business Enterprise Centre, Mainstreet Coordinator, Agriculture Western Australia Development Officer and Landcare Coordinator – however, in many cases each person task and skill base appears to be tighter than witnessed in the USA.

### ***What we saw***

- In the USA, university cooperative extension and agricultural extension play a different role to that in Australia. However, the model in Wisconsin showed how partnership and collaboration could be achieved under one banner, such as the Land-grant University.
- The Small Farm Centre in California is an agricultural resource centre linking the information needs of “small scale farming” to those who have the information. It produces publications, sponsors conferences and seminars. The Centre is a significant force in the promotion of the importance of small-scale farming, crop diversification, alternative marketing techniques, family farming and organic farming.
- Few places in Western Australia with less than 2000 people would have people like Connie Loden. Connie works as the Marketing Coordinator for the Iron County Development Zone that covers a population of 6,000 and is similar to Manjimup in the sense that 85% of the land is forested and 9% agricultural.

### ***Lessons learnt***

- Partnerships between community and education provider can have mutually beneficial outcomes.
- Members of university cooperative extension services, who were posted to rural areas, provided additional skills, networks and associated economic benefits for their communities. These rural-based officers also gained an understanding of issues and needs in their geographic areas which, in turn, was transmitted back to university-based researchers, urban areas, and to other agencies. This created an open flow of communication that helped rural people meet their needs.
- An organisation that meets the needs of the whole rural community can be easily integrated into that community, and serves as a “one stop” information shop.
- Entrepreneurship, innovation and enterprise need to be supported within communities through a grass roots and local approach

### ***Suggested actions***

- Generate an understanding of the US Cooperative Extension Service through invitation of speakers to address WA-based groups or conferences, or, at least get the facts on funding, inter-relationships, and integration in smaller communities
- Consider trialling something similar to the local support for USA communities in WA.
- Trial a system whereby university support for rural areas is brokered in such a way that the community has some say in what priority areas for action or research (at the moment support appears to be *ad hoc* on a “first come first served basis”).
- Form a strategic alliance with Small Farm Centre. This will have broader applicability for Agriculture Western Australia’s Sustainable Rural Development Program.
- Establish a dialogue between the five WA universities and the South West College of TAFE
- Exemplify locally educated and successful current and former community members as role models.
- Identify successful local projects and highlight role of higher education in their success.
- Investigate a community based university employed government agency assisted extension officer model.

***Case Study:***

***Wisconsin and Great Lakes Visitor Information Centres, USA***

Contacts: Cathy Techtmann, Carol deMars and Barb Campbell

The Great Lakes Visitor Information Centres is a \$9 million project that was jointly funded by the US Forest Service, National Parks Service and two state authorities: University of Wisconsin Extension and Highways Authority. The centre provided a very large interpretive centre and interactive display area. This was of the highest standard and included historical information, scientific information, and mini cinema.

***Lessons Learnt:***

Take a cooperative approach to facilities particularly large ones, and ensure all organisations work together. The University has been critical in the ongoing use of the facilities as an educational facility. The most highly used travel centres in Wisconsin were located near the State border and featured:

- Online weather information.
- Pre packaged/gathered brochures behind desk for each interest group were efficiently delivered.
- Regional branding was evident in Wisconsin. Brochure and maps were provided on specific activities - not necessarily just in local area but based in regions.
- Purpose built design/accessibility.

***Key elements of success:***

- Person behind the counter.
- Location
- Interactive components.
- Dedicated tourist information centre instead of a craft outlet.
- The most significant feature about the regional/State Centres was the fact that they were located on a major highway not necessarily in a major town or city. Located on main road next to hotel or toilet facilities.

***Case Study:***

***Scenic Highways and Byways, Chico State University, California, USA***

Contact: Evelyn Sheffield

The US Forest Service pioneered the development of scenic driving program to showcase the scenic, historic, recreational and natural qualities of the country's finest roads. Scenic highways have demonstrated capacity to increase tourism, visitor expenditures and jobs – on one scenic highway with high visitor volumes the economic impact was estimated at \$68.22 per visitor vehicle.

Chico State University entered a tourism partnership with local business, via the facilitation of Evelyn Sheffield. Design students were instrumental in creating a range of useful and stylish images for the very successful Scenic Highways and Byways. Processes used include: merchandising small product lines, cross marketing, recruiting stakeholders, assessing market potential for affinity groups.

*Key elements of success:*

- Clear guidelines and brief for specialists
- Rigorous assessment ensuring high customer (driver) credibility with product
- Use of specialist product which can be tailored and used by several communities

## 6. Leadership

The study tour reinforced that fostering leadership is crucial in ensuring vital and empowered rural communities. With the exception of a short briefing on the Wisconsin Rural Leadership Program and our time in Wisconsin the tour group did not specifically visit a leadership program. Nonetheless, the day to day examples of rural leadership, the ability of rural communities to cut across insular industry mindsets had impact on the study tour group. Particularly, examples of alliances between environmentalists and foresters and political leadership in Californian communities highlighted the critical importance of rural leadership in regional development.

By developing a critical mass of people with leadership skills we can assist to stop the drain from rural communities. Programs developed should encourage a “can do” attitude within individuals and communities. In addition, the programs should be dynamic and flexible and cover a broad range of people. It is also important to encourage rural leaders to undertake further education and training to continually improve their skills.

### *What we saw*

- Wisconsin Rural Leadership Program.  
This program promoted leadership training as an investment in economic development. Human needs within the community were given a value equivalent to economic development. This investment is vital to community building and improvement and was clearly displayed by Connie Loden and the Wisconsin Rural Leadership Alumni.
- Interagency Cooperation.  
It was clearly evident that through cooperation between agencies, private sector, environmentalists and agri-industry a great deal could be achieved in an effective and resourceful manner.
- Leadership from Government  
In the US, alliances were able to get the parties with different opinions to the table to find some common ground. The current forest debate in WA is very divisive with no indication of getting the various parties to the negotiating table to find a workable long-term solution. As an example, the gridlock over the forest debate in the Northern California was broken by a whole of government commitment (driven by the President’s commitment and directive) for agencies to work together, to develop partnerships and work to a common vision. (see Appendix 5).



### ***Lessons learnt***

- Rural training programs should encompass the whole “rural community”, not just farm-based participants.
- Leadership is needed to develop pride and belief in local items of interest and the country way of life.
- Need to encourage a wide range of ages into a leadership program, particularly youth training.
- It is important to provide ongoing support for those that have participated in leadership training so the individuals in communities do not feel isolated. Over time as more people become proficient with leadership they will have a loose association which will provide a self-supporting role. In the interim the need for support is critical.

### ***Suggested actions***

- Use of, and development of existing leadership courses such as WA Rural Leadership Program.
- A loose association, developing to a coordinated approach, between current leadership programs, across Western Australia, Australia, and overseas
- Audit of rural leadership training.
- Ensure that leadership training is accessible for a wide ranges of ages, those with special requirements and, is demographically balanced (e.g. women, over 40s, ethnic groups, fishing industry).
- Assist in the celebration and recognition of leaders in WA rural communities.
- Develop an alliance with the Wisconsin Rural Leadership Program.

## **Conclusion**

In conclusion, the Agriculture and Nature Based Study Tour has already had significant impact on the South West communities. Individuals participating on the tour have begun to act as a catalyst within their own industry and also local community.

The response of the participants has been extremely positive and indicative of the value of tours of this type to generate new ideas for the South West. As a group, the study tour participants have also committed to several projects as a group, as well as begun to inspire other groups within the community. In tour debriefing sessions, participants have emphasised the long-term value of this tour for the South West region. Some selected comments from participants highlight to impact the tour has had so far:

“As a result of the tour I have taken on board ideas/resources and material that I can take into meetings and workshops. Most of what we saw is relevant to our communities and, as a councillor, I am involved in similar challenges.”

Carolyn Hull, Waroona

“I have gained networks both overseas and in WA. The intellectual discussion on a daily basis with the other tour participants was extremely useful in pushing my boundaries and getting me to think outside the box.”

Shelley Pike, Shire of Swan

“Gained the motivation to continue to engage stake holders in development of regional and sub regional marketing strategies.”

Pauline Vukelic, Bunbury

“California was a extremely valuable learning experience – may come to be more relevant than we think. The tour has opened my mind to new ideas and how others set about to achieve their goals.”

Robyn Bowles, Waroona

“Overall the trip was a great experience for me – I learnt heaps and will be using it for years to come.”

Barbara Maidment, Margaret River

“The value of the trip was the confirmation that many of our policies are on the right track. One of the most constructive outcomes was the example of how regional branding is a success when marketing agricultural product... I think real value could be in bringing out some of the key people we met to talk to bigger audiences.”

Keith Liddelow, Manjimup

# Appendices

## Appendix 1 - Tour participants

Name	Town/LGA	Comments
Keith Liddelow	Manjimup	Shire President
Shelly Pike	Swan Shire	Executive Manager Strategic and Statutory Services - asked by her Shire & other regional bodies (ERMC) to nominate
Barbara Maidment	Margaret River	Business Enterprise Centre facilitator
Dina Barrett-Lennard	Beverley	Manages Avondale Farm an AGWEST, involvement in agritourism in Avon Arc region.
Pauline Vukelic	Bunbury/Capel	Chair of Bunbury Tourist Board. Links with Bunbury-Wellington Economic Alliance, Tourism Board, South West Tapestry (the later to link in with Rural Shires in Region) & Cooperative Research Centre on Sustainable Tourism.
Glyn Yates	Collie	Small businessman & Councillor for Shire, member of local Tourist Board, Chamber of Commerce, LCDC etc & Collie River Marketing Group.
Tony Jenour	Burekup/Dardanup	Evedon Park Farms Stay manager, very exhaustive involvement in Farm Stay, tourism associations including National bodies and Dardanup Tourism Committee & Wellington Forest Advisory Committee.
Deborah Dixon	Bridgetown	Community Builder & Mainstreet Coordinator.
Nick Oaks	Bridgetown	Shire Councillor and representative Timber Workers Union. Graduate from Australian Rural Leadership Program. Membership on Southern Province Projects Group.
Rob Gates	Bunbury	Chairman SW Trails Association
Carolyn Hull	Waroona	Councillor, Foundations for Leadership graduate.
Robyn Bowles	Waroona	Flower grower - Lynton Valley Farms
David Chidlow	Narrogin	Director Environmental & Planning Services with Shire.
Michelle Sherwood	Denmark	Local business person who has demonstrated link with Local Tourist Bureau and Shire. This region has high nature based tourism interest. Small primary producer.
Owen Grieve	Albany	Journalist
Theo Nabben	Bunbury	AGWEST Team Leader
Ann Lyster	Manjimup	RPG Chairperson with a strong interest in farm tourism
Ross George	Bunbury	AGWEST Program Manager SRD Program (SW)

## Appendix 2 – Media and communication work undertaken

### (i) Participant presentations (as at 29/2/2000)

Date	Who	No ppl	Tour Participant
September 27 1999	Collie Land Conservation District Committee	10	Glyn Yates
September 22 1999	Bunbury Tourism Board	10	Pauline Vukelic
October 4 1999	Denmark Shire President Colleen Donnelly		Michelle Sherwood
October 30 1999	Alcoa Bauxite Mine Tour	30	Robyn Bowles
October 28 1999	Collie Full Shire Council	25	Glyn Yates
October 27 1999	National Farmstay Assoc. Board Meeting		Tony Jenour
October 20 1999	Harvey Rural Partnership Group	8	Theo Nabben, Ann Lyster
October 18 1999	Peel Development CEO		Robyn Bowles
October 13 1999	Farmstay Association Board Meeting	8	Tony Jenour
October 10 1999	Collie Chamber of Commerce & Industry	35	Glyn Yates
November early	Manjimup Historical Society	10	Ann Lyster
November 9 1999	Tourism South West Board Meeting	8	Tony Jenour
November 5 1999	FACET seminar on wine tourism	60	Shelley Pike
November 30 1999	Pemberton Rural Partnership Group	17	Theo Nabben, Ann Lyster
November 25 1999	Denmark Tourist Bureau Manager - Elizabeth Gauci		Michelle Sherwood
November 25 1999	Trails West group	2	Rob Gates
November 24 1999	EMRC Tourism Committee	10	Shelley Pike
November 23 1999	SW Tapestry Meeting	30	Glyn Yates, Pauline Vukelic, Tony Jenour
November 18 1999	Collie Tourist Bureau Board	10	Glyn Yates
November 17 1999	Horticultural Expo Speakers Forum	5	Tony Jenour, Deb Dixon
November 12 1999	CWA Regional Meeting	30	Dina Barrett Lennard
November 11 1999	Mundaring Shire President		Shelley Pike
January	South West Development Commission		Pauline Vukelic
February 2000	Manjimup Chamber of Commerce and Industry		Ann Lyster
February	Bunbury Chamber of Commerce and Industry		Pauline Vukelic
December 6 1999	Collie River Marketing	10	Glyn Yates

December 3 1999	Flowers West (peak flower group in WA)	30	Robyn Bowles
December 21 1999	Manjimup Tourist Bureau	10	Ann Lyster
December 1999	Friends of the Bibbulmun Track		Rob Gates
December 13 1999	Swan Valley Planning Committee	10	Shelley Pike
	Avondale Reseach Station	8	Dina Barrett Lennard
	Bridgetown First AGM	15	Deb Dixon, Nick Oaks
	Paul Omodei's RFA Consulative Committee	12	Nick Oaks, Keith Liddlelow
	Bridgetown Chamber of Commerce & Industry	10	Nick Oaks
	Dardanup Shire Council Tourism Committee	8	Tony Jenour
	Manjimup Rotary Club	10	Keith Liddlelow
	Manjimup Shire Council	12	Keith Liddlelow, Ann Lyster
	Warren Blackwood Resource Strategy Planning Group		Keith Liddlelow
	Waroona Local Economic Development Unit	11	Carolyn Hull
	Laguebrook Dam & Waroona Dam Consultative Committe	8	Carolyn Hull
	Waroona Tourist Bureau		Carolyn Hull
	Spoken to Don Punch re: engaging SW in US model		Nick Oaks, Ross George
	Aboriginal Groups		Rob Gates
	Edith Cowan University Board	15	Pauline Vukelic
Proposed	Greenhills Progress Association		Dina Barrett Lennard
Proposed	Swan Council & Staff		Shelley Pike
Proposed	Eastern Metropolitan Regional Council seminar		Shelley Pike
Proposed	Peel Development Commission		Robyn Bowles, Carolyn Hull
Proposed	Waroona Shire Council		Robyn Bowles, Carolyn Hull
Proposed	Trails West Advisory Council		Rob Gates
Proposed	WA Volunteers		Rob Gates
16-Feb-00	Group of B & B operators workshop		Rob Gates
21-Feb-00	Greenhills Tourism Cooperative	20	Dina Barrett Lennard
Proposed	Margaret River Shire and Staff		Barbara Maidment
20-Dec-99	Tourism Development Workshop - MR shire	19	Barbara Maidment

Proposed	Bunbury Wellington Economic Alliance		Pauline Vukelic
Proposed	South West Chamber of Commerce and Industry		Pauline Vukelic
Proposed	Manjimup Lions Club		Ann Lyster
23-May-00	2000 Heartex (Heartlands RTA exchange), York.	40	Dina Barrett Lennard
21/02/2000	SW Trails Group meeting with Minister Sport & Rec.		Rob Gates
8/03/2000	SW Trail Group meeting With Shadow Cabinet	15	Rob Gates

(\* No. of people spoken to is approximate)

**(ii) Participant media reports (as at 29/2/2000)**

Date	Medium	Where	Participant
Weekly column x 6	Press	Margaret River Times	Barbara Maidment
Early September	Radio	ABC Radio	Pauline Vukelic
Proposed	Radio	ABC Radio	Ann Lyster
7 October 1999	Press	Collie Mail	Glyn Yates
13 October 1999	Press	York Chronicle	Dina Barrett Lennard
10 October 1999	Press	Collie Mail	Glyn Yates
October	Press	Beverley Blarney	Dina Barrett Lennard
8 December 1999	Press	Narrogin Observer	David Chidlow
23 November 1999	Radio	ABC Radio	Pauline Vukelic
23 August 1999	Radio	Radio SW	Pauline Vukelic
19 August 1999	Press	Collie Mail	Glyn Yates
21 September 1999	Radio	ABC Radio, 6WA	Owen Grieve
	Draft report	Exec. Director SRD (David Hartley)	Dina Barrett Lennard
	Press	South West Times	Nick Oaks
	Press	Manjimup Times	Nick Oaks
	Radio	Country Hour	Owen Grieve
	Radio	Country Hour	Owen Grieve
	Radio	Country Hour	Owen Grieve
11 January 2000	Press	Harvey/Australind Reporter	Carolyn Hull
9 December 1999	Press	Albany Advertiser	Michelle Sherwood

**(iii) Participant projects (as at 28/12/1999)**

Timeline	Proposed Project	Details	Name
November 1999	Photographic competition. Avondale Harvest Festival	Completed	Dina Barrett Lennard
Proposed	Horticultural groups in Manjimup to discuss labour		Ann Lyster
Proposed	Bus tour of Waroona district	Hopes to use local Show Society	Robyn Bowles
Proposed	South West Gateway Tourist Centre		Pauline Vukelic
Ongoing	Education programs on farms for Singaporean students	Partnership between Agwest and Education Dept as well as Singapore educators	Tony Jenour
March, April, May 2000	Collie foundations for leadership course		Glyn Yates
September 2000	Harvest Ball	Working with Beth Abbott (NRG participant)	Ann Lyster
March, April, May 2000	Boyup Brook/Bridgetown Foundations for Leadership Course		Deb Dixon, Nick Oaks
December 1999 to May 2000	Town planning guidelines in brochure form	Commenced	David Chidlow
24 April 2000	King Jarrah Challenge	Direct result of tour – showing trails can be multi use	Rob Gates
Commenced early 2000	Implementation of Conservation Easements, changed land use planning	Four new positions in Swan Shire being created, one direct result of study tour	Shelley Pike
August 2000	Hally Swan to visit WA, talk on conservation easements in Swan Valley and Denmark areas	Would also try to get her to speak to LGA conference	Shelley Pike, Michelle Sherwood
Proposed	Denmark Diversification and Opportunities Field Day	Similar model to Walpole Field Day	Michelle Sherwood
Proposed	Audio Heritage Trail in Narrogin		David Chidlow
Commenced	Investigation of leadership courses or community builders in Margaret River area. Particularly interested in RWIL		Barbara Maidment
Proposed	Trademark of "Farmers' Markets"	Having Roseanne Sharpe do brief	Ross George
Proposed	Amend "Progress Rural WA" guidelines for region	Follow up with B. Thorpe/D. Beurle	Ross George
Commenced	Action Learning Group for public involvement/participative planning	Canvas interest and form group	Ross George
Commenced	The SWTG is organising a mini Trails Tour in the SW region to connect local trail enthusiasts together so we may learn how they perceive trails in their area and become a regional trails network.		Rob Gates



### Appendix 3 – Key Contact details:

Note this section includes only key contacts made during the trip or those referred to in case studies:

#### *Californian section:*

**Contact:** Greg Giusti,  
**Address:** US Cooperative Extension Forest & Wildlands Ecology Advisor  
Agricultural Center/Courthouse  
Ukiah, CA 95482  
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**Contact:** Michael Dimock, Sunflower Strategies  
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**E-mail:** [mdimock@sonic.net](mailto:mdimock@sonic.net)

**Contact:** Ellen Rilla  
Director, University of California,  
Cooperative Extension, Marin County  
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Novato, CA 94947-7018  
**Phone:** (415) 49 4204 **Fax:** 499 4209  
**Email:** [erilla@ucdavis.edu](mailto:erilla@ucdavis.edu)

**Contact:** Bruce Goines  
Rural Development Program Manager, Cooperative Forestry  
USDA Forest Service  
Pacific South West Region  
**Address:** 1323 Club Drive, Vallejo, CA 94592  
**Phone:** (707) 562 8910 **Fax:** 707 562 9054  
**Email:** [bgoines/r5@fs.fed.us](mailto:bgoines/r5@fs.fed.us)

**Contact:** Glenn T. McGourty,  
Viticulture & Plant Science Adviser, Mendocino & Lake Counties,  
University of California - Cooperative Extension  
**Address:** Mendocino County  
County Agriculture Center  
579 Low Gap Road  
Ukiah  
CALIFORNIA 482 - 3734  
**Phone:** 707 463 4495 **Fax:** 707 463 4475

**Address:** Marin County Community Development Agency  
3501 Civic Center Drive  
RM 308  
San Rafael  
CA 94903 – 4157  
**Phone:** 415 499 7880 **Fax:** 415 499 6278  
**E-mail:** [AHINDS@MARIN.ORG](mailto:AHINDS@MARIN.ORG)

**Visitation:** Sonoma Select  
**Contact:** Ken Silveira, Owner/Operator  
Burke Webb Product Manager/Buyer  
**Address:** 550 Gravenstein Highway No.  
SEBASTEPOL CALIFORNIA 95472  
**Phone:** 707 823 4916 **Fax:** 707 823 1473

**Host/Hostess:** Hally Swan  
**Contact:** T.J. Nelson and Association Inc  
**Address:** PO Box 2678  
SANTA ROSA CALIFORNIA 95405  
**Phone:** 707 836 7080 **Fax:** 707 836 7088  
**E-mail:** [swanland@sonic.net](mailto:swanland@sonic.net)

**Visitation:** Westside Farms  
**Contact:** Ron and Pam Kaiser  
**Address:** 7097 Westside Road  
HEALESBURG CALIFORNIA 95448  
**Phone:** 707 431 1432

**Wisconsin Contacts:**  
**C/ Connie Loden**

**Contact:** Connie Coley Loden  
**Address:** Iron County Development Zone Council  
P.O. Box 97 - 100 Cary Rd.  
Hurley, WI 54534  
**Phone:** 715-561-2922 **Fax:** 715-561-3103  
**Website:** <http://www.ironcountywi.com>

**Contact:** Michael Jones,  
**Address:** University of Wisconsin – Green County Extension Officer  
N3150B Hwy 81  
Monroe  
WI 53566  
**Phone:** 608 328 9440 **Fax:** 608 328 519  
**E-mail:** michael.jones@ces.uwex.edu

**Contact:** Barb Campbell, Wisconsin Travel Information Centre  
**Address:** South 51 Rest Area  
PO Box 327  
HURLEY WISCONSIN 54534  
**Phone:** 715/561-5310 **Fax:** 715/561-4234

**Contact:** Carol DeMars, Bayfield Tourist Information Centre  
**Address:** PO Box 138  
42 South Broad Street  
BAYFIELD 54814  
**Phone:** (715) 779 3335 **Fax:** (715) 779 5080  
**E-mail:** [www.bayfield.org](http://www.bayfield.org)

**Contact:** Cathy Techtmann  
**Address:** Northern Great lakes  
Visitor Centre  
29270 County Highway G  
ASHLAND WISCONSIN 54806  
**Phone:** (715) 685 2671 **Fax:** (715) 685 0036  
**E-mail:** catherine.techtmann@ces.uwex.edu

### *New York Contacts*

**Visitation:** Stonybrook Suffolk County  
**Host/Hostess:** Professor Lee Kopperman and Joe Gergela III Long Island Farm Bureau  
**Contact:** Joe Gergela  
**Address:** 104 Edwards Avenue  
CALVERTON NEW YORK 11933  
**Phone:** 516 727 3777 **Fax:** 516 727 3721  
**E-mail:** nygergela@mail.fb.com

### *UK contacts*

**Contact:** Roy Dart, Alistair Sim, Ian Stokes and & Susan Hayes,  
Farming And Rural Conservation Agency [FRCA] – Senior Policy  
Advisors  
**Address:** FRCA,  
Woodthorn  
Werga Road  
Wolverhampton WV6 8TQ  
**Phone:** 01902 743711 **Fax:** 01902 693295

**Contact:** Frank Cartwright, Rays Farm Country Matters  
**Address:** Billingsley  
Brdignorth  
WV16 6PF  
**Phone:** 01299 841255

**Contact:** Janets Bed & Breakfast  
**Address:** Farm Holiday Bureau - Accommodation In The Country  
Janet & Terry Rouse  
“Morar”  
Weald Street, Bampton Oxon OX18 2HL  
**Phone:** 01993 850162 **Fax:** 01993 851738  
**E-mail:** [Janet@farm-holidays.co.uk](mailto:Janet@farm-holidays.co.uk) & [www.farm-holidays.co.uk/morar/](http://www.farm-holidays.co.uk/morar/)

## **Appendix 4 – Itinerary for Agriculture & Nature -based Tourism Study Tour**

**USA, UK & Germany, 28/9/99 to 17/9/99**

### Saturday, 28 August 1999 Day 1

Perth/Sydney/Los Angeles/San Francisco  
Depart Perth for SF

Accommodation: Sheraton, Fisherman's Wharf, 2500 Mason St. San Francisco CA 94133.

Phone: 0011 - 1 - (415) 362 5500

Fax: 0015 - 1 - (415) 989 9757

### Sunday, 29 August 1999 Day 2

San Francisco

Free morning for sight seeing or rest, a suggestion is to see the Farmers market in downtown SF. Bus transfer along coast to Fort Bragg

Accommodation: EBB Lodge - Fort Bragg- full accommodation details not confirmed yet.

Phone: 0011 - 1 - (800) 974 6730

### Monday, 30 August Day 3

Fort Bragg/ Mendicino/Santa Rosa

Meet Greg Giusti from UC Davis who will take us to local forestry office. Greg is contact for the day

Phone: (707) 463 4495

Fax: (707) 463 4477

A slide show of historic logging along the north coast of California. Marc Jameson, forester changes in the town of Fort Bragg. Jere Melo, City Councilman and forester drive to forest landowner site Overview of how a land owner is dealing with the change from forestry and livestock production to tourism based enterprise. Drive to the village of Mendocino for lunch and presentation from a representative of the Mendocino Promotional Alliance. Lunch and chance for people to walk around Mendocino a bit. Drive to Anderson Valley, stop at a winery, presentation from a representative of the AG/Tourism study group.

Depart for Santa Rosa.

Accommodation: Flamingo Resort Hotel, 2777 Fourth St, Santa Rosa.

Phone: 0011 - 1 - 800-848 8300

Fax: 0015 - 1 - 707-528 1404

### Tuesday 31, August, Day 4

Santa Rosa/ Point Reyes /Marin County/Santa Rosa

Host for day Ellie Rilla; contact details.

Phone: (415) 499 4204

Fax: (415) 499 4209

Marin County Community Development Officer & Exec Director of Marin Ag Land Trust. Pt Reyes.

John Dell'Osso "Community relationship with the Park".

Alex Hinds "Land Use Planning in Marin".

Bob Berner "MALT, past, present & future".

Visit entrepreneurs at Doughty Ranch to see diversification of dairy business.

Visit entrepreneurs who specialise in ecotourism with an agricultural flavour: Mike & Sally Gale. Travel back to same accommodation at Santa Rosa.

Accommodation: Flamingo Resort Hotel, 2777 Fourth St, Santa Rosa.

Phone: 0011 - 1- 800-848 8300

Fax: 0015 - 1- 707-528 1404

#### Wednesday, 1 September, 1999 Day 5

Santa Rosa/Sonoma County/San Francisco

Breakfast meeting with Michael Dimock, contact details.

Phone: 0011 - 1- (707) 528 2222

Fax: 0015 - 1 - (707) 528 6575.

Occidental Arts and Ecology. The Centre is currently operated by a partnership of environmental and arts related people who run a non-profit and provide education on organic gardening, permaculture, corporations and democracy, beekeeping, natural building, and developing sustainable communities.

Westside and Laguna Farms A look at more traditional agri-tourism and event-based farm promotions. Westside has an annual October on the Farm Harvest Celebration that draws tens of the thousands of people from the San Francisco Bay area over four consecutive weekends.

Fiesta Market - We will see impact of Select Sonoma County Buy Local Campaign at the retail level. Point of purchase merchandising and retailer perspectives.

p.m. Travel to SF for meeting with Monty House

Accommodation: Sheraton, Fisherman's Wharf, 2500 Mason St. San Francisco CA 94133.

Phone: 001 - 1 - (415) 362 5500,

Fax: 0015 - 1 - (415) 989 9757

#### Thursday 2, September, 1999 Day 6

San Francisco/Minneapolis, Minnesota

Seminar series; seminar room at the Sheraton. Contact for seminar series is Bruce Goines (Forestry Dept)

Phone: (707) 562 8910

Fax: (707) 562 9054

Seminar Topics include:

Michael Dimock - background on innovative marketing strategies undertaken to promote agriculture and regional communities.

Overview of economic adjustment initiative Nth CA/Oregon - Bruce Goines.

Ecotourism partnership with local business - Evelyn Sheffield from Chico State Univ.  
Michael MacKenzie –Barr.  
Depart for Minneapolis.  
Accommodation: Holiday Inn Select, St Paul Apt, Three Appletree SQ, Bloomington  
Phone/Fax: 612-854 9000

Friday 3, September, 1999 Day 7

Minneapolis/Eau Claire & other destinations in Wisconsin  
Arrive for Welcome breakfast at Eau Claire County Agriculture and Resource.  
“Achieving Community Involvement/Creating Change” speaker C Y Allen.  
“Achieving Balance” speaker Lowell Klessing.  
Depart for separate tours.  
Tour groups splits one section going to Northern Wisconsin, other to Southern Wisconsin.  
Connie Loden is key contact.  
Phone: 0011-1 (715) 561 2922  
Fax: 0015 - 1- (715) 561 3103  
Mobile: 715 - 492 - 4646

Nature Based-Northern Group

Lac du Flambeau (2.5-3 hours from Eau Claire) Waswagoning/Historic Native American Village, Hurley Area.

Evening Program “ABC’s of Heritage Tourism Development” speaker Connie Loden

Accommodation: Whitecap Ski Resort, Hurley, 2 Condos reserved - 6 beds in each  
Phone: 0011 -1- 715-561-2227 or 715-561-2776  
Fax: 0015- 1- 715-561

Saturday, 4 September Day 8

Focus on Hurley - Decline of mining and timber. Small community heritage attraction envelopment.  
Wisconsin Travel Info Centre  
Farmers Market  
Iron Co. Historical Society Museum  
Hawk Hollow/Little Finland/Scandinavian Log Homes  
Montreal -- Historic Mining Town/Tour The Inn B & B  
X-Country Ski-Bike Trails, ATV/ Snowmo/Mountain Bike Trails - Heritage sites linked to trails.  
Waterfalls (Upson, Potato River, Superior and Peterson)-- Plummer Mine.  
Festival Italiano - Food Booths on the Street PM.

Accommodation: as above at Hurley -Whitecap

Sunday, Sept. 5 Day 9

Bayfield Chamber - Bayfield -Small Coastal Community - Applefest --- Orchards ---  
New Age Co-op – Tourism.

Sea Kayaking - Trek and Trail, an International Adventure Tour.

Dinner - Depot Pub/ Tour of South Shore Micro Brewery

Accommodation: Chequamegon Hotel - Hwy. 2, Ashland

Phone: 715-682-9095 or 800-946-5555

Monday, 6 September Day 10

Great Lakes Visitor Centre. Discuss Visitor Centre Partnership (Tour of Centre) "Land Use Planning to retain the Northwoods character". Presented by Cathy Techtmann.

Phone: 608-685-9983

Wisconsin Dells - Meet rest of tour.

Southwest - Ag Tourism section

Wetherby Cranberry Farm, Cranberry Expo, and Cranberry Festival Tour presented by Nodji Van Wychen; Sparta (45 minutes from Warrens),. Sparta-Elroy Bicycle Trail - Sparta Chamber of Commerce.

Dinner - Sparta -- Hosted by the Gary Kirking Family

Accommodation: Sparta Area - Just N Trails

Phone: 608-269-4522

Fax: 608-269-3280

Deer Path Farm Bed & Breakfast

Phone: 608-272-3231

Soper Creek Inn,

Phone: 608-272-3935

Saturday, 4 September Day 8

Down a Country Road Amish Farm Tours- This is a an example of a farm tour business idea. It also speaks to how to sell farm produced products. Includes Hill Valley Cheese tour.

Meet Southwest Wisconsin Tour Guides at Down a Country Road they will also provide Home Stay Accommodations in Platteville.

Driver and Host: Eileen Nickels - Lunch - in Route, Fennimore-Silent Woman.

Phone: 608-822-3782

Cassville (3 hours from Sparta)

Stonefield Village Platteville.

Accommodation: Home Stays with Wisconsin Rural Leadership Program people.



Sunday, Sept. 5 Day 9

Mineral Point (.5 hours from Platteville)

Mineral Point Chamber Shullsberg (1/2 hour from Mineral Point) - Declining mining and ag area.

Brewester's Cafe and Cheese Factory.

Depart for Pecatonica -Grandview Heritage Site. Heritage Site with youth program involved.

Accommodation Sunday - as above overnight in Platteville

Monday, Sept. 6 Day 10

Dodgeville (45 minutes from Platteville)

12 Spring Green - Frank Lloyd Wright Heritage Site - Taliesin Arrive Wisconsin Dells - Meet rest of Group.

Monday, 6, September, 1999 Day 10

(Public Holiday)

Both Groups meet at Wisconsin Dells.

Ride the Ducks.

Crane Foundation - Program on Wisconsin Dells by Al Anderson.

Depart for New Glarus.

Accommodation: Hotel/Motel Accommodations - Chalet Landhaus, New Glarus

Tuesday 7, September Day 11

New Glarus/Chicago/New York

"Ethnic/Ag Tourism & marketing" and tour of town . Mike Jones.

Coach charter to Chicago (O'Hare Airport,).

Arrive New York (Newark International).

Accommodation: Pennsylvania Hotel, 401 , 7<sup>th</sup> Ave, 33<sup>rd</sup> St. New York

Phone: 0011 - 1- (212) 736 500

Fax: 0015 - 1- (212) 502 8799

Wednesday 8, September Day 12

New York/ Suffolk County

New York - options are:Free day or Suffolk County, Long Island - primarily landuse planning & tapping into urban markets. Participants to make own arrangements for NY tours.

Arrive SUNY, Stonybrook Suffolk County . Group will have discussions on landuse planning & meet Joe Gergola, Chair of local farm Bureau.

Tour of farms in area.Return New York.

Accommodation: as Day 11

Thursday 9, September Day 13

New York/ London

Arrive Heathrow Airport , UK.

Accommodation: Forte Posthouse, Heathrow, Bath Road, Hayes, Middlesex.

Phone: 0011 - 41 - 181 759 2552

Fax: 0015 - 41 - 181 564 9265

Friday 10, September Day 14

London/Oxfordshire/Marches

We will be guided by members of the Farm And Rural Conservation Authority (FRCA).

Key contacts: Roy Dart, Gill at FRCA

Phone: (01902) 6393238

Fax: 01902 693185

Alistair Sim

Phone: 01865 845165

Fax: 01865 845120

Visit two agritourism business - near Oxfordshire & High Wickham.

Millets Farm - which has a farm shop and Odds Farm , specialising in promoting farm heritage. Frilford.

Odds Farm - Wooburn Common, High Wycombe Farm Holiday Bureau - informal discussion on its operations.

Travel to Marches area (Shropshire) near Welsh border.

Accommodation: Ludlow Travelodge, Woofferton, Ludlow, Shropshire, SY8 4AL

Phone/Fax: 0011-41- (0)1584 711695

Saturday 11, September Day 15

Marches

Guided by the FRCA

Pembridge, Hertfordshire - visit Cider Orchard & shop.

Ludlow Food Fair .

Accommodation: As per day 14

Sunday 12, September Day 16

Marches

Guided by the FRCA

Visit to another Country Farm, Bridgnorth. Discussion on development of Marches Countryside Attractions Group & its quality management systems.

Visit Ironbridge Gorge & Museums

Monday 13, September Day 17

Marches/London

Return to London.

WA Agent-General to show us Selfridges food promotion in heart of London. Rest of day free.

Accommodation: Park Court Hotel, Lancaster Gate, London  
Phone: 0011 - 41- 171-402 4272  
Fax: 0015 - 41 - 171-706 4156

Tuesday 14. September Day 18

London/Frankfurt/Giessen, Germany

Rest of day is free until mid afternoon, then Depart for Frankfurt. Arrive Frankfurt.

Accommodation: Hotel Steingarten, Hein Heckroth Strasse 20, Giessen GERMANY  
Phone: 0011 - 49 641-38990

Wednesday 15. September Day 19

Frankfurt/Giessen, Germany

Plan was to have discussion on German Tourism market - its make-up & possibility for nature based tourism activities in SW WA.

Thursday 16. September Day 20

Giessen, Germany

Tour debrief & preparation for Study Tour report.

Friday 17. September Day 21

Giessen/Frankfurt/London/Perth

End of tour - fly to Perth

Saturday 18. Sept Day 22

Arrive Perth



## United States Office of Forestry and Economic Development

333 S.W. First Avenue, P.O. Box 3623, Portland, Oregon 97208-3623



### The President's Forest Plan: Breaking Gridlock and Moving Forward



For years, an uncertain future loomed before the people and communities in Oregon, Washington and California as disagreements grew over the management of public forest lands, which created conflict, division, and ultimately gridlock.



To put an end to the gridlock and move the region forward, on April 2, 1993, President Bill Clinton convened the Forest Conference in Portland, Oregon. For the first time in history, environmentalists, timber companies, Native American tribes, and local, state and federal governments sat down together at one table and focused on the future of natural resources management.



From the Forest Conference came the President's Forest Plan, whose goals were clear:



- \* Support the region's communities during a period of economic transition
- \* Provide a sustainable timber economy
- \* Protect and enhance the environment
- \* Make federal agencies work together as one government



The President's Forest Plan was released only six months ago, yet it is already being successfully implemented on the ground, with many significant accomplishments:

To support the people and their communities through this period of transition, in 1994 more than \$126 million in grants and loans were awarded to more than 100 communities throughout the region creating opportunities for new jobs, job training programs, community infrastructure, small business assistance and other efforts.

To protect and enhance the environment, in 1994 more than 400 watershed restoration projects were completed or initiated, putting people to work repairing and enhancing streams, waterways and other restoration projects.

Years of gridlock were broken within two months after the President released his science-based forest plan, when federal courts lifted injunctions banning timber harvesting on some federal lands, which allowed timber sales in owl habitat to move forward for the first time in three years.

While there is still much to do in the years ahead, a solid foundation is now in place for complete and successful implementation of the President's Forest Plan.

The President's Forest Plan consists of three main components:  
**Economic Revitalization, Forest Management, and Interagency Cooperation**

The following pages outline in more detail the Forest Plan's goals, implementation, and highlight some of the many other accomplishments to date.

## Economic Revitalization

***The Economic Adjustment Initiative is aimed at providing immediate and long-term relief for people, businesses and communities affected by changes in forest management practices.***

The people attending the Forest Conference clearly stated they wanted the opportunity to determine their own economic futures, but in order to do it effectively government red tape had to be cut, and financial and technical assistance had to be delivered where and when it was needed.

To accomplish those goals, ideas from people and communities are gathered and considered by one-stop centers for all types of financial assistance called the ***Community Economic Revitalization Team*** (CERT). Each state has one CERT whose membership is individually tailored to deal with the needs of workers, families, businesses and communities in their state.

To eliminate red tape, the CERTs are working to streamline government and overcome bureaucratic barriers. ***By the end of fiscal year 1994, 25 barriers of red tape had been removed.***

***In FY 1994, more than \$126 million in grants and loans were awarded for more than 160 projects in over 100 communities throughout the region to help with job training, small business assistance, community infrastructure and many other efforts.***

While the list of projects and communities is extensive, the economic assistance projects can be placed into four main targeted areas:

### Assistance to Workers and Families

**Example: \$6.6 million to Oregon and \$1.8 million to Washington to retrain more than 1,750 dislocated workers**

### Assistance to Business and Industry

**Example: \$33 million in grants to stimulate business growth and economic development projects in rural communities in Oregon, Washington and California**

### Assistance to Communities

**Example: More than \$45 million in grants and loans to help rural communities in Oregon, Washington, and California plan and build water and waste treatment facilities and other improvements to community facilities and infrastructure**

### Ecosystem Investment

**Example: \$27 million to fund more than 400 watershed restoration projects in Oregon, Washington and California, restoring the environment and providing jobs**

The President's Forest Plan hopes to distribute more than \$900 million to the region over the remaining four years of the Economic Adjustment Initiative. While more than \$248 million in grants and loans were available from a variety of federal programs and agencies in 1994, the overwhelming majority of the money spent was in the form of grants, and the remaining unspent funds were due to a lack of demand for the loans and loan guarantees.

## Forest Management

***The goal: Create a science-based natural resources management plan that both protects the environment and provides for a sustainable timber harvest.***

Recognizing forests are a complex network of biological systems, the Forest Plan calls for innovative ***ecosystem management*** planning. To plan for the future of these ecosystems, Washington, Oregon and California are broken into 12 provinces that share common aquatic and terrestrial characteristics, with watersheds serving as the basis for the planning areas to help assure clean water for people and healthy habitat for fish and wildlife.

When the President's science-based Forest Plan was released on April 13, 1994, within two months ***federal courts lifted injunctions banning timber harvesting on public lands, allowing timber sales in owl habitat to move forward for the first time in three years.*** To protect the environment around riparian areas and aquatic habitat, timber sales are designed to limit impacts on streams in the region. While it will take a few years to reach the forest plan's target level, ***timber sales*** are expected to be about 1.1 billion board feet per year.

***In fiscal year 1994, the following was also accomplished:***

- \* ***252 million board feet of timber was sold from public lands within the range of the northern spotted owl***
- \* ***An additional 257 million board feet was sold from public lands outside the range of the northern spotted owl***
- \* ***1.28 billion board feet was actually harvested: 851 million board feet within the range of the northern spotted owl/376 million outside of the range of the northern spotted owl***
- \* ***Initiated scientific review of proposed management actions in late-successional reserves and allowed ecologically sensitive activities to move forward.***

An ***Aquatic Conservation Strategy*** is aimed at restoring and maintaining the ecological health of watersheds. The strategy provides direction for watershed analysis, restoration and monitoring for the region.

***Among the accomplishments in 1994 to implement the Aquatic Conservation Strategy:***

- \* ***Completed or initiated 400 watershed restoration projects, which are restoring streams and putting people to work.*** For example, two teams of displaced timber workers in the Olympic and Willamette National Forests earned family wages while being trained for and implementing watershed restoration projects. This type of successful program will be applied in other forests throughout the region in 1995.
- \* ***Completed analysis of 34 watersheds***
- \* ***Analysis of an additional 40 watersheds underway***
- \* ***Completed a uniform guidebook for watershed analysis***

## Forest Management continued

The Forest Plan also develops creative new management techniques such as ***Habitat Conservation Plans, which allow landowners to move forward with their economic goals while still conserving forests and waterways for habitat preservation.***

Currently, negotiations are underway with 25 landowners on Habitat Conservation Plans which would cover nearly 3.7 million acres in Oregon, Washington, and California.

***A framework was developed for regional research, scientific oversight, and monitoring plans*** to ensure that the implementation of projects will be monitored now and in the future, and that up-to-date scientific information on ecosystem management will be shared between all participating groups.

The Forest Plan recognizes six different types of ***federal land allocations*** to preserve old growth forests, protect the environment, and allow for timber harvest of trees less than 80 years old, or salvaging activities that help promote characteristics of ancient forests:

Riparian Reserves: 2.2 million acres along streams and wetlands to protect and enhance clean water and to create habitat.

Adaptive Management Areas: 1.5 million acres consisting of ten areas intended for innovative forest management. They are located near forest-dependent communities.

Matrix Lands: Includes 4.9 million acres outside of reserves and withdrawn areas which are available for timber harvest.

Congressionally Withdrawn Areas: 7 million acres of National Parks, wilderness areas, national monuments and other federal lands where timber harvest is prohibited.

Late-successional reserves: 7.1 million acres of federal lands where old-growth or late successional cutting is prohibited.

Administratively Withdrawn Areas: 1.7 million acres of federal land to be used for various uses such as experimental forestry, research, recreation, and scenic areas.

The plan also establishes ten ***Adaptive Management Areas (AMA)*** within the forest plan region. These AMA's will become living laboratories where experimenting with innovative, environmentally sensitive forest management techniques will be encouraged and developed.

The AMA's will also allow the opportunity for people to play an important new role in helping determine for the future of their local forests, by working with their local federal agencies at the grass-roots level developing new experimental forestry techniques and plans for their AMA. Federal guidelines establishing this process were put together in the fall of 1994, and the AMA's are now getting their public participation processes underway.

## Interagency Coordination

***Instead of creating more bureaucracy, the President directed existing federal agencies involved with the forest plan to work together as one government in creative new interagency groups.***

In an unprecedented effort by the federal government, the interagency groups have brought the federal agencies who are developing, monitoring, and overseeing the forest plan to the table, where they are effectively working together to implement the forest plan. Agencies are now working as one government and saving money by jointly coordinating efforts, improving communication, sharing information, and eliminating duplication.

***With the President continuing with his commitment to downsize federal government, each agency involved with the forest plan redirected their priorities and dedicated time, staff and resources to the interagency groups to make the forest plan work.***

The ***Interagency Steering Committee*** (ISC) establishes overall policies for the forest plan. The committee is chaired by the White House Office of Environmental Policy and its members include the Cabinet-level offices of the Secretary of the Interior, Secretary of Agriculture, Administrator of the Environmental Protection Agency, and the Secretary of Commerce.

The ***Regional Interagency Executive Committee*** (RIEC) serves as the senior regional body implementing the forest plan, coordinating and communicating policies with agencies in the forest plan area. Members of the committee include the Pacific Northwest and California directors of the Bureau of Land Management, Forest Service, Fish and Wildlife Service, National Marine Fisheries Service, Bureau of Indian Affairs, the Environmental Protection Agency, and the National Parks Service. Advising the RIEC is the ***Regional Intergovernmental Advisory Committee*** (RIAC), which ensures key participation from the state and tribes within the region.

The ***Regional Ecosystem Office*** (REO) provides independent recommendations and scientific, technical and other staff support to the RIEC to help implement the forest plan. Staff of the REO are on loan from federal agencies involved with the forest plan.

Each of the 12 provinces has a ***Provincial Interagency Executive Committee*** (PIEC), made up of federal agency directors who oversee the implementation of the Forest Plan within their province. A major component of the PIEC are the ***Advisory Committees***, made up of community, business, environmental groups, Native American tribes, and federal, state, and county officials who directly advise the PIEC. The PIEC Advisory Committees are the grass-roots contact for involvement in the Forest Plan process.

Assisting the Economic Adjustment Initiative are the ***Multi-Agency Command*** (MAC) and the ***Regional and State Community Economic Revitalization Teams*** (RCERT and CERT). The MAC members include the sub-Cabinet-level offices of the Secretary of Commerce, Secretary of Labor, Secretary of the Interior, Secretary of Agriculture, Secretary of Housing and Urban Development, Secretary of Transportation, Small Business Administration, and other federal officials. RCERT and state CERT members include representatives from California, Oregon, Washington, Native American tribal organizations, and federal agencies responsible for awarding grants and loans.



**Marin Agricultural Land Trust**



**Agricultural Conservation Easement Program**

January 1999

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**Summary**

Marin Agricultural Land Trust's (MALT) purpose is to help keep land in agriculture by offering landowners a way to capitalize on the increased value of their property without having to sell or subdivide the land. We do this by purchasing agricultural conservation easements from agricultural landowners. The program is voluntary and is designed to be responsive to individual needs and goals. Values and prices are based on an independent appraisal of each property.

Anyone interested in learning more about the program can call or visit Bob Berner, Executive Director, or Lisa Bush, Conservation Specialist, at (415) 663-1158, or talk to any of the members of MALT's Board of Directors. Inquiries are confidential and without obligation. A copy of a "sample" agricultural conservation easement is available from the MALT office.

**Purpose**

The objective of MALT's program is to provide a flexible, voluntary mechanism to support long-term preservation of agricultural land in the County.

Because Marin County's agricultural land is both beautiful and close to the fast growing San Francisco Bay Metropolitan area, land prices have escalated far above values based on agricultural uses. Rising land values make it hard to keep land in farming families because of high estate taxes, the need to buy out non-farming co-owners, the high cost of buying land, or the attraction of an offer to sell.

MALT's Program cannot solve all of these problems. But it gives landowners a choice. If a landowner wants to realize the "development value" from his or her land without selling the land or subdividing it, he or she can sell an agricultural conservation easement to MALT and keep the land. In addition to being paid now for the "development value" of the property, the sale of an easement can lower estate taxes significantly. The program offers many options for estate planning.

Since 1980, MALT has acquired conservation easements on 39 properties totaling 25,904 acres.

**The Concept of Development Rights and Conservation Easements**

Full (fee simple) ownership of real property consists of a "bundle" of rights, such as the right to farm, to construct buildings, to subdivide the land, to extract minerals, or to restrict access. These rights are only limited by previous legal restrictions and governmental regulations applicable to the property. Some rights in the "bundle" can be transferred to others while retaining the remaining rights of ownership. For example, mineral rights can be separated from the "bundle" of property rights and sold.

The right to build on real property is known as the development right. When development rights are transferred to a conservation organization like MALT, the specific restrictions regarding the amount and

type of development that are given up are set forth in a legal document called a conservation easement, which is recorded on the title to the property.

### **What is an Agricultural Conservation Easement?**

An agricultural conservation easement is a specialized type of conservation easement, the purpose of which is to restrict future uses of a parcel of land in order to protect its agricultural character and productivity. The easement prohibits subdivision, non-agricultural residential or commercial development, and uses or practices which would be destructive to the agricultural value and productivity of the land. The easement is recorded, and future owners are bound by its terms.

The landowner retains title to his or her property. The easement does not grant public access or limit in any way the owner's right to lease, sell, mortgage, devise, or otherwise transfer title to the land.

### **How Much Is An Easement Worth?**

The method for establishing the value of a conservation easement is to determine the fair market value of the property without the easement restrictions (the "before" value)—using comparable land sales—and to subtract from this value the market value of the property as restricted by the easement (the "after" value). The difference between the "before" and "after" values is the value of the easement.

Historically, MALT has paid from \$275 to \$1,500 per acre for the easements it has purchased. As a percentage of unrestricted ("before") market value of land (not including the value of improvements), easement prices have ranged from 25–50%. The price per acre for easements usually rises as the market value of land increases. The average price per acre of easements over the past ten years has been \$1,000 per acre. We expect that prices as a percentage of land value will continue in the historical 25–50% percent range, with the average between 40% and 50%.

### **Income Taxes on Sale of a Conservation Easement**

An Internal Revenue Service Ruling (Rev. Rule. 77-414) provides that the entire cost basis of a property may be allocated to the sale of a conservation easement in calculating gain. Therefore, there may be little or no tax for even many low-cost-basis landowners when they sell an easement to MALT.

A conservation easement may also qualify as "like kind" property for purposes of tax-deferred exchanges under Internal Revenue Code (IRC) Section 1031. Thus, the sale of an agricultural conservation easement might be used to finance the purchase of other agricultural land, business or investment real property in a non-taxable Section 1031 transaction.

### **Why Sell An Easement To MALT?**

Some MALT easement purchases have assisted families or individuals in purchasing land. The buyer sells an easement to MALT in order to reduce the net cost of the land, making the purchase possible or more attractive. In other projects the proceeds of easement sales have been used to retire debt, to buy out co-owners, for general savings and investment, or to establish a retirement fund. Selling an easement can be a very useful tool for financial and estate planning.

## Examples

MALT purchases a conservation easement and pays the landowner for the value of the easement. The landowner retains title to the land, and continues agricultural operations as usual. The values and prices used in the examples here are for illustration. Actual values and prices will be different from these examples and will vary from property to property.

### Example #1

Joe and Sam, brothers, own an 800 acre ranch 50/50. Joe operates the ranch; Sam lives in town and is not involved in agriculture. When Sam decides to sell his interest in the land, Joe must buy him out or put the property up for sale.

Joe decides to buy Sam out, and to pay for most of the cost by selling a conservation easement on the 800- acre ranch to MALT.

\$1,600,000	Market value of land (800 ac. @ \$2,000/ac.)
<u>960,000</u>	Easement restricted value of land (800 ac. @ \$1,200/ac.)
\$ 640,000	Value of easement paid to Joe (\$800/ac. x 800 acres)
<u>800,000</u>	Cost to buy Sam out (½ market value)
\$ 160,000	Additional cash or loan required to buy out Sam's interest

Joe is able to stay in agriculture without having to go heavily into debt. Eight hundred acres of farmland are preserved, and a viable agricultural property remains in a family operation.

### Example #2

Given the same figures as in Example #1, if the 800 acre property were being sold for \$1,600,000, it could be purchased by an agricultural buyer at a net cost of \$960,000 if an easement was sold to MALT for \$640,000 at the same time.

### Example #3

Bill and Ann Smith plan to retire from their ranch in 20 years. They decide to sell a conservation easement on their 500-acre property to MALT to fund a retirement program. This strategy will also provide substantial liquidity for financial and estate planning or other purposes.

\$1,250,000	Market value of land (500 ac. @ \$2,500/ac.)
<u>750,000</u>	Easement restricted value (500 ac. @ \$1,500/ac)
\$ 500,000	Value of easement paid in lump sum (\$1,000/ac. x 500 acres)
-0-	Capital gains tax (assuming \$500,000 tax basis allocated to easement sale reduces gain to 0).
\$ 500,000	Net proceeds from sale of easement after taxes
\$ 500,000	placed in tax-exempt investment (municipal bond fund) at 6% would yield \$30,000 annually.
\$ 30,000	annual bond interest invested in tax-exempt investment at 6% each year over 20 years would equal \$1,103,500.

The Smith's equity (land + cash) after 20 years:

\$1,103,500	Tax free investment fund (\$30,000 per year at 6%)
500,000	Conservation easement proceeds in municipal bond fund
<u>1, 354,500</u>	Value of land (subject to easement) adjusted for appreciation of 3% per year
\$2,958,000	Total equity, land & proceeds

### **Source of Funds for Easement Purchases**

Funding for MALT's easement program comes from a variety of sources. Some comes from State and Federal agricultural land conservation grant programs. Most comes from contributions from individuals, foundations, and corporations on a project-by-project basis.

### **Process**

1. Initial meeting with MALT staff to get detailed information about how the program works and to provide information about the property and individual or family circumstances.
2. MALT staff and Board evaluate the potential easement project based on program criteria (available from the MALT office).
3. An appraisal is ordered.
4. The appraisal report is provided to the landowner. MALT and the landowner make a final decision whether to pursue the project. Both parties agree on terms, a timeline and other details.
5. MALT raises money for easement purchase.
6. Escrow closes; the conservation easement is executed and recorded; the purchase price is paid to the landowner.

In some situations, an easement seller may not be able to wait until MALT raises all of the money to pay for the easement. For example, the easement sale may help to pay for the purchase of an agricultural property, and the terms of the purchase agreement require closing escrow before MALT can raise all of the money to buy the easement. In such special circumstances, MALT may be able to borrow money or use temporary funds in order to close escrow on the easement purchase before all of the permanent funds are on hand.

### **For Information**

Call (415) 663-1158 and talk to Bob Berner, MALT Executive Director, or Lisa Bush, Conservation Specialist, or stop by the office at 520 Mesa Road (Marin County Farm Bureau Building) in Point Reyes Station. You may also contact any of the members of MALT's Board of Directors. Inquiries and negotiations are confidential.