

A Guide for Foresters and  
other Natural Resource  
Professionals on using:  
*Managing Your Woodlands:*  
*A template for your plans for the future*



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## Introduction to the Template and Guide

This guide was developed to assist you, the forester or natural resource professionals, in working with a landowner to develop a forest resources management plan using the *Managing Your Woodlands: A template for your plans for the future*. We encourage you to work with the Landowner as a co-creator in the development of their plan. A landowner who is more involved in the development and has a clear understanding of what their plan outlines will be more likely to implement the management outlined in the plan.

There is also a landowner guide that is available to help landowners prepare materials in advance of working with their foresters. Landowner involvement in the development of a plan is very important, as they need to understand and agree with their plan to implement it. This guide includes useful information for landowners including description on the type of information that is necessary to include in the template. There is also a glossary with relevant forestry terms, and a list of available resources. If you are planning on meeting with a landowner, you might want to provide them with a copy of the landowner guide, as the template and guides are tools to assist you in working with the landowner.

### Why this template?

This template allows landowners to participate in several different programs available to them:

#### **American Tree Farm System**

The American Tree Farm System® (ATFS) is the largest and oldest sustainable woodland system in America, internationally recognized, meeting strict third-party certification standards.

For 70 years, ATFS has enhanced the quality of America's woodlands by giving forest owners the tools they need to keep forests healthy and productive. Stemming the loss of America's woodlands is vital to our country's clean water and air, wildlife habitat, recreational activities, and producing the wood and paper products we all need. ATFS provides landowners with the validation that they are doing right by their land, meeting the highest standards of sustainability and being good stewards for the future.

ATFS is a program of the American Forest Foundation.

*The American Tree Farm System grows stewardship from the roots.*

To participate in your state ATFS program, please visit

[www.treefarmssystem.org/stateleaders](http://www.treefarmssystem.org/stateleaders)

#### **Forest Stewardship Program**

The Forest Stewardship Program works through State forest agency and other partners to sustain and improve our Nation's private forest landscapes. The program develops and delivers appropriate technical and planning assistance to enable active, informed, long-term forest management. Forest Stewardship management plans provide landowners with practical guidance for achieving their

own unique objectives in a way that also maximizes public goods and services provided by forests, such as clean drinking water, clean air, carbon sequestration, wood fiber, recreation, and scenic landscapes. Landowners who implement Forest Stewardship management plans are in a much better position to participate in certification programs and access emerging markets, such as those for ecosystem services and biomass for energy

### **Natural Resources Conservation Service (NRCS) incentive programs**

NRCS provides financial assistance to private landowners to implement forestry and agroforestry related practices through Farm Bill and discretionary conservation programs. Assistance is also provided for multi-year and permanent easements to conserve forest land to meet program goals. There are several incentive programs including:

- *Environmental Quality Incentives Program (EQIP)* offers financial and technical help to assist eligible participants including forest owners with management practices on their lands; a forest management plan is required to participate.
- *Wildlife Habitat Incentive Program (WHIP)* offers technical and cost-share assistance for landowners to establish and improve fish and wildlife habitat; family forestland is eligible and forestry practices are encouraged.
- *Conservation Stewardship Program (CSP)* offers stewardship contracts to landowners who meet a certain threshold of land stewardship and agree to maintain and improve their land.
- *For more information about these and other programs refer to <http://www.nrcs.usda.gov/programs/> or contact the local NRCS office.*

## **Where to Begin?**

A management plan should be completed by a forester or other natural resource professional, but the landowner needs to take an active role in the development of their plan. The landowner should be considered a co-creator of the plan with the forester.

An *Understanding Your Plan* Guide is available to forest landowners and is a companion to this guide and the forest management plan template. Foresters and natural resource professionals are encouraged to provide the landowner guide to their landowner clients as a resource. There are several sections of the template that the landowner can either complete or begin before meeting with their forester. The forester can also begin gathering some of this information prior to the first meeting with the landowner:

- **Owner's contact information**
- **Property Description:** complete as much as possible and then review with the landowner.
- **Property History:** most of this information will be provided by the landowner and then reviewed with their forester. The forester can gather information about the area surrounding the landowner's property such as existing landscape or watershed plans.
- **Forest Management Goals:** the forester asks the landowner to identify their goals for their property

- **Property Maps:** collect the appropriate maps of the property (e.g., aerial photos, soil map, etc.) and compare or reconcile with any maps the landowner has.
- **Forest Natural Resources Enhancement and Protection:** the forester or planner will complete this section but the landowner can start to think about their goals related to the different topic areas and provide to the forester. Ask the landowner:
  - Are there any special sites that you and your family have that you want to protect?
  - From your personal knowledge or research, are there special sites, that threatened and endangered species might be using on your property (Reference: [www.treefarmssystem.org/woodlandresources](http://www.treefarmssystem.org/woodlandresources))
  - Have you considered the other section descriptions within the landowner guide and thought about your goals or concerns?
- **Stand Level Information:** the forester will complete this section, but the landowner should identify their objectives for each stand, given the goals that they have outlined.
- **Management Activity Schedule and Tracking:** the landowner and forester, working together, will need to develop the schedule and he/she will be responsible for tracking activities (unless they have designated someone else to be in charge of implementing the management plan). Make sure the landowner understands and are comfortable with the dates documented for the different activities that have been outlined in the plan.

When completing a section, review the requirements in the guide to ensure that you fill in all the appropriate information. When meeting with the landowner initially, review what information they have already compiled from using the landowner guide to gain their perspectives or clarify certain points.

## Cover Page: Owner and Plan Author

This section provides the contact information for the landowner and the plan preparer (the forester or natural resource professional). Be sure to encourage the landowner to keep this section updated. And remind them to inform you and their participating programs if any of the information changes:

- Forest Stewardship Program: State forestry contact or State Forester's office (list of State Foresters is available at [http://www.stateforesters.org/about\\_nasf](http://www.stateforesters.org/about_nasf))
- American Tree Farm System: state American Tree Farm System contact ([www.treefarmssystem.org/stateleaders](http://www.treefarmssystem.org/stateleaders))
- NRCS Incentive program: Local service center (<http://offices.sc.egov.usda.gov/locator/app>)

Note the date when the plan was originally completed. Encourage the landowner to regularly review their plan, be sure to date and initial any updates or notes that they add.

## Property Description

The legal property description includes the name of the state, name of the county, township number, range number, section number, and portion of a section where relevant. This information can be found on their property deed.

The Tax Parcel Number is the number assigned to their property by their local tax assessor. This number is not required but it can be helpful to record all relevant property information in one location.

If they are planning on participating in a USDA Farm Bill program, then the landowner will need to register at the nearest USDA Service Center.

GPS coordinates are very helpful in locating relevant maps online.

The entire property may not have trees and not all of the woods may be eligible for this plan, but cleared land can be included if the intent is to plant trees on it. Hence the three acreage questions in this section:

- Total ownership acreage: the total acreage of the property
- Total forested acreage: the total acreage with trees
- Total acreage covered by plan: the portion of the acreage that will be described in this plan (forested or not).

For the topography and access information, these are estimates based on your experience on the property. For the slope section, include what percentage of land is in each category.

For the road condition, the percentages represent how much of the roads are accessible to vehicles. For the estimates of road length, include estimated miles of road for each category.

Please include the watershed unit that is appropriate for the state.

## Property History

The Property History is a brief description of the history of the land and ownership including length of current ownership, past management activities, and surrounding environment (whether nearby property is developed, private woods, public forests, etc.). This information can be based on personal knowledge, property records, and local information sources as well as what evidence is seen on the ground, stumps, skid trails, etc.

## Forest Management Goals

Ownership Goals are at the heart of the plan and describes what the landowner wants to gain from their property and resources. We encourage landowners to make a list of their goals and objectives that reflect their expectations, personal values, and the potential of

their woods. Their goal statements should broadly summarize their vision for their land, but should be specific enough to know if they are reaching them. In the landowners guide, we use some information about goal development from the *Good Forestry in the Granite State: Recommended Voluntary Forest Management Practices for New Hampshire* (Bennett, 2010).

## Property Maps

Maps are a valuable tool for forest owners and many mapping tools are now available online for them. For the property maps they will need to include the following:

1. Delineate property boundaries, stands, special sites, threatened and endangered species present, water resources, roads, existing practices, future conservation practices, scale, and a directional arrow. Example of map types could include:
  - A Contour map
  - Aerial photo (for free aerial photo downloads <http://earth.google.com/>) GIS printout
2. Soil Information
  - Soils Map: including legend, interpretations, etc.  
For soil maps, NRCS has developed a web-based map-making tool for private landowners: <http://websoilsurvey.nrcs.usda.gov>.  
Or you can check with the local NRCS office (<http://offices.sc.egov.usda.gov/locator/app>). Soil maps are required for NRCS incentive programs.

Multiple copies of the maps might be necessary to ensure the legibility of information. Some states agencies also have mapping tools available online, check with the state forestry agency for more information.

## Forest Natural Resources Enhancement and Protection

This section relates to the natural resource elements found throughout the entire property. Some of the treatments related to these resource areas may qualify for federal and state incentive programs. Include appropriate activities and treatments in the Management Activity Schedule and Tracking table as well as on the map(s). Complete the Activity Schedule and draw and label the areas of management on the map if using this plan as part of an incentive program application. There is no need to repeat this information in the stand specific section.

For this section, consider the goals that the landowner has identified for their woods. You will also need to address the following information for each section:

1. What treatments/ monitoring/ protection are planned?
2. When will they implement treatments (season, year), follow-up activities, etc?
3. Where will the management take place: entire stand, part of a stand, acres?
4. Do they have applicable permits, professional assistance, and applications for the incentive programs?

## **Protect Special Sites and Social Considerations**

### **Special Sites**

Are there archeologically, culturally, historically, geologically, biologically or ecologically valuable sites or high conservation value forests (HCVF) on the property that should be delineated and protected? The concept of HCVF is one that is used by various organizations, including ATFS, to describe forests of outstanding and critical importance due to their environmental, social, biodiversity or landscape values. What assistance did you seek when identifying special sites or what information did you gather? There are lots of online resources available to help identify special sites in your state. A landowner can visit [www.treefarmssystem.org/woodlandsresources](http://www.treefarmssystem.org/woodlandsresources) to find their state's information.

Special sites can also include sites that are designated by the landowner, and can represent places or things that are important to them or their family.

### **Adjacent stand or ownership concerns**

How does surrounding management affect their woods and how do the landowner's actions impact their neighbors? Consider aesthetic quality, wildfire concerns, privacy, wildlife movement and habitat, noxious weeds, urban encroachment, if applicable. Aesthetic qualities should be considered throughout this plan as it is being developed.

It might be appropriate to consider a modification of forestry practices in consideration of public view, including timber sale layout, road and log landing locations, intersections with public roadways, distributing logging residue, tree retention, timing of operations and other factors relevant to the scale and location of the project.

For more information on federal and state designated weeds, please visit <http://plants.usda.gov/java/noxiousDriver>

### **Recreation**

If recreation is one of the landowner's goals for their woods then identify the resources and how they will be addressed in their management.

### **Access**

Are property boundaries posted? How are they marked? Does the landowner have legal access to the property? Is public access allowed? Address access for management purposes.

## **Air, Water, and Soil Protection**

### **Soil protection**

Consider steep slopes, woody debris retention, nutrient cycling, vehicle travel, soil compaction, flood runoff, livestock issues, silvopastures, and Best Management Practices (BMPs), if applicable. Include a soil map if desired (**Note:** required for NRCS).

BMPs are essential to ensuring the benefits for air, soil and water that are made possible through sound management of your woods. To find the BMPs in your state, visit

[www.treefarmssystem.org/woodlandresources/](http://www.treefarmssystem.org/woodlandresources/) and search by your state to find the link to BMPs.

### **Roads**

Consider general maintenance, erosion potential, BMPs, if applicable, road surface condition, road runoff, drain-dips, culverts, stream crossings, weed control, and time-of-year use.

### **Streams, wetlands, ponds, lakeshore**

Consider BMPs, if applicable, riparian habitat, wildlife, and road crossings. If a wetlands delineation map is available, include as a reference.

### **Effects of Natural Disasters**

Has the property been affected by floods, wildfire, wind, ice or other natural disasters? Are you at risk? Consider what the landowner should do after a natural disaster occurred, if appropriate.

### **Rangeland Resources (if applicable)**

If there is rangeland on the property then address that resource in this section.

### **Carbon sequestration (optional)**

This is an optional resource that the landowner might want to consider. Include a current estimation of the tons of standing carbon per acre plus growth rate—sequestration per year. Carbon sequestration consideration is not currently a requirement of either the Forest Stewardship Program, American Tree Farm System or NRCS programs.

## **Fish, Wildlife and Biodiversity**

### **Fish & Wildlife**

Consider desired species, habitat improvement, animal control, den sites, nest boxes, snag retention, access, hunting, and the current state of the habitat. What assistance did you seek or information did you gather?

### **State and Federal threatened or endangered species - plants or animals**

What assistance did you seek or information did you gather related to state and federal threatened or endangered species? To search for site specific information visit [www.treefarmssystem.org/woodlandsresources](http://www.treefarmssystem.org/woodlandsresources).

## **Management of Forest Resources**

For the management described in this section include the general management that relates to the natural resource elements found throughout the entire property. For stand specific management activities, please include those in the **Stand Level Information** section.

### **Protection from Pests**

Includes insects, diseases, weeds, invasive species. What inventory, control, monitoring, prevention guidelines will be employed. Consider using a range of integrated pest management including mechanical, physical, biological, cultural or chemical management.

### **Reforestation and Afforestation**

Consider natural seedling recruitment, planting, site preparation, and current conditions that might affect regeneration.

### **Prescribed Fire/Burns** (optional)

Prescribed fires/burns can be a very useful management tool in certain locations and certain times. Consider using prescribed burns for stand/habitat improvement, fuel reduction, Home Firewise Safety (below), current fuel conditions, and degree of wildfire risk.

**Home Firewise Safety:** Home Firewise Safety is a program sponsored by the US Forest Service, US Department of the Interiors and the National Association of State Foresters to encourage local solutions for wildfire safety. For more information about this, please visit <http://www.firewise.org/index.php>

**Firewise Communities Program:** The National Fire Protection Association's ([NFPA](#)) Firewise Communities program encourages local solutions for wildfire safety by involving homeowners, community leaders, planners, developers, firefighters, and others in the effort to protect people and property from the risk of wildfire. The program is co-sponsored by the [USDA Forest Service](#), the [US Department of the Interior](#), and the [National Association of State Foresters](#).

To save lives and property from wildfire, NFPA's Firewise Communities program teaches people how to adapt to living with wildfire and encourages neighbors to work together and take action now to prevent losses. We all have a role to play in protecting ourselves and each other from the risk of wildfire. For more information visit [www.firewise.org](http://www.firewise.org)

### **Management Plan Implementation Constraints**

Consider available markets for wood products, landowner interest and time, financial limitations, land use ordinances, seasonal access, wildlife activity, insect activity, operability due to slope, etc.

### **Other**

Use this space to include information on any other natural resource enhancements and protection that are not included in the sections above.

## Stand Level Information

### Stand Objectives

Work with the landowner to identify objectives for each stand that relate to the goals that the landowner outlined.

### Stand Current Conditions

**General Description:** This section would include the history, site index, elevation, slope, stand quality and health, average growth rate, summary of size classes, summary of heights, stocking level, density, risk rating, etc. for the stand in question. Further detailed inventory/plot data can be included if desired.

**Current forest type and current age:** For each forest type represented in the stand, include an estimate of its current age.

**The bird's eye view of current stand conditions and structure** are simple graphic representations of the landowner's woods. They are meant to provide the landowner with an understanding of the different spacing and structures that can be found and what their stand looks like at the time their plan was developed. Current spacing shows how far apart different size trees are from each other.

### Stand Desired Future Stand Condition

This section outlines what the stand will look like in the future, based on the landowner's objectives for the stand.

**Desired Forest Type and Expected Longevity:** This section shows the forest type(s) you would like to see in this stand and the maximum age you expect trees to reach before they die of natural causes or they are harvested.

This section also addresses how the tree species would grow either through natural regeneration or planting.

### Forest Management Activities

Once the desired future stand condition has been identified, then this section will outline the forest management activities for each stand.

**Forest Health Management Activities:** These activities include pruning, pre-commercial thinning from above/below, prescribed fires, sanitation, salvage, etc.

**Harvesting:** For these activities, describe the type of treatment: even-aged (clearcut, thinning), uneven-aged (group select, single tree select, overstory removal, understory removal, etc), treatment methods (ground based or skyline), time of year, type of harvest; seed tree, multiage, sanitation, etc.

**Slash management:** For this section, discuss how the slash will be addressed after a management activity. Examples include: leave slash at the stump, jackpot pile, whole tree skid, chipping, pulp. Address the large woody debris and nutrient cycling.

**Post management activities:** These could include burning landings, piles, broadcast or seeding roads and landings and/or weed spray roadsides.

**Permits:** Include a list of permits for which you applied for or will need to apply for, if necessary for the management activities outlined here.

**Best Management Practices:** Is there a wetland or stream within your management activity area? Is it properly marked and are the appropriate laws being followed? BMPs are essential to ensuring the benefits for air, soil and water that are made possible through sound management of your woods. To find the BMPs in your state, visit [www.treefarmssystem.org/woodlandresources/](http://www.treefarmssystem.org/woodlandresources/) and search by your state to find the link to BMPs.

**Monitoring:** After the management activity occurs, how often will the activity area be evaluated to ensure the overall forest management goals are being met?

**Repeat the Stand Level Information sections for each stand identified on the property.**

## **Management Activity Schedule and Tracking**

This section includes the schedule of management activities for each stand and can be used by the landowner to can track when the activities were completed, what incentive programs were used (if any) and what the net cash flow was for that activity. The net cash flow is optional and only a tool to help the landowner track the financial costs/benefits for the different management activities. Encourage the landowner to update the schedule if an activity date changes.

The American Forest Foundation has developed a brochure to help woodland owners. It can be found online:

[http://www.treefarmssystem.org/2008FarmBill/AFFFarmBillBrochure\\_web\\_lo.pdf](http://www.treefarmssystem.org/2008FarmBill/AFFFarmBillBrochure_web_lo.pdf)

If the landowner is planning on applying for NRCS incentive programs, then the NRCS Practice Code will need to be included in this activity schedule. These codes can be found on the NRCS Conservation Practice Standards website

(<http://www.nrcs.usda.gov/technical/standards/nhcp.html>).

Common forest practices for NRCS programs:

- [Forest stand improvement](#)
- [Tree or shrub site preparation](#)
- [Tree or shrub establishment](#)

- [Forest trails and landings](#)
- [Road/Trail/Landing Closure and Treatment](#)
- [Forest slash treatment](#)
- [Firebreak](#)
- [Fuel Break](#)
- [Prescribed burning](#)
- [Tree or shrub pruning](#)
- [Riparian forest buffer](#)
- [Silvopasture establishment](#)
- [Multi-Story Cropping](#)
- [Windbreak or shelterbelt establishment](#)
- [Windbreak or shelterbelt renovation](#)
- [Integrated Pest Management](#)
- [Wetland restoration](#)
- [Restoration and Management of Rare and Declining Habitats](#)
- [Early Successional Habitat Development/Management](#)
- [Upland Wildlife Habitat Management](#)
- [Access Control](#)
- [Access Road](#)

Each state NRCS office adds state specific information to these standards and specifications and can be viewed at the state's field office technical guide: <http://www.nrcs.usda.gov/technical/efotg/index.html>

There might also be state run incentive programs that might need to be included in this section as well.

## **Signatures and Approvals**

With this plan, the landowner is eligible to participate in the US Forest Service's Forest Stewardship Program, the American Forest Foundation's American Tree Farm System and NRCS incentive programs. This plan will need to be reviewed and approved by representatives for each of the programs in which the landowner would like to participate.

## References

Bennett, Karen P. editor. 2010. *Good Forestry in the Granite State: Recommended Voluntary Forest Management Practices for New Hampshire (second edition)*. University of New Hampshire Cooperative Extension, Durham, N.H. [www.goodforestry.org](http://www.goodforestry.org)

Swenson, Steve, 2009. *My Healthy Woods: A Handbook for Family Woodland Owners managing woods in Southwest Wisconsin*. A publication of the Aldo Leopold Foundation and the American Forest Foundation, Baraboo, WI.

<https://www.aldoleopold.org/Programs/myhealthywoods.shtml>

## Resources for the Landowner

- Forest Stewardship Program:  
<http://www.fs.fed.us/spf/coop/programs/loa/fsp.shtml>
- List of State Foresters and their contact information:  
[http://www.stateforesters.org/about\\_nasf](http://www.stateforesters.org/about_nasf)
- American Tree Farm System: [www.treefarmssystem.org](http://www.treefarmssystem.org)
- Your state American Tree Farm System contact:  
[www.treefarmssystem.org/stateleaders](http://www.treefarmssystem.org/stateleaders)
- NRCS: <http://www.nrcs.usda.gov/>
- 2008 NRCS Farm Bill Conservation Programs:  
<http://www.nrcs.usda.gov/programs/farbill/2008/index.html>
- NRCS Conservation Practice Standards:  
<http://www.nrcs.usda.gov/technical/standards/nhcp.html> Provides information on all the different Conservation Practices and their codes.
- NRCS Field Office Technical Guide:  
<http://www.nrcs.usda.gov/technical/efotg/index.html> Technical guides are the primary scientific references for NRCS. Technical guides used in each field office are localized so that they apply specifically to the geographic area for which they are prepared..
- Woodland Owners Brochure on 2008 Farm Bill:  
[http://www.treefarmssystem.org/2008FarmBill/AFFFarmBillBrochure\\_web\\_lo.pdf](http://www.treefarmssystem.org/2008FarmBill/AFFFarmBillBrochure_web_lo.pdf)
- Woodland Owner Resources: <http://www.treefarmssystem.org/woodlandresources/> Provides information on fish, wildlife, biodiversity, special sites and Best Management Practices for you state.
- To find out information on your watershed, visit:  
<http://cfpub.epa.gov/surf/locate/index.cfm>
- **The attached appendices are additional resources for landowners.**

## Appendix 1: Glossary

**Acceptable Growing Stock:** Saleable trees that are of good form, species and quality and would be satisfactory as crop trees.

**Adaptive management:** A dynamic approach to forest management in which the effects of treatments and decisions are continually monitored and used to modify management on a continuing basis to ensure that objectives are being met (Helms et al, The Dictionary of Forestry, Society of American Foresters, 1998)

**Adverse regulatory actions:** Written warning, citations or fines issued by law enforcement or regulatory bodies.

**Aerial Photo:** Photo taken from an elevated position like on an aircraft.

**Afforestation:** the establishment of a forest or a stand in an area where the preceding vegetation or land was not forest. (Helms et al, The Dictionary of Forestry, Society of American Foresters, 1998)

**Age Class:** A distinct aggregation of tree that originated at the same time, from a single natural event or regeneration activity or a grouping of trees (e.g. ten year age class) as used in inventory or management. (Helms et al, The Dictionary of Forestry, Society of American Foresters, 1998)

**Aspect:** The direction that a slope faces (north, south, etc.)

**Basal Area:** The cross-sectional area of a tree, in square feet, at 4.5 feet from the ground (at breast height). When the basal area of all the trees in a stand are added together, the result is expressed as square feet of basal area per acre, which is a measure of a stand's density.

**Biomass:** A renewable energy source of biological materials derived from living, or recently living organisms, such as wood, waste, and crop residues.

**Biodiversity:** The variety and abundance of life forms, processes, functions and structures of plants, animals and other living organisms, including the relative complexity of species, communities, gene pools and ecosystems at spatial scales that range from local through regional to global (Helms et al, The Dictionary of Forestry, Society of American Foresters, 1998).

**Board Feet:** A unit for measuring wood volumes. It is commonly used to express the amount of wood in a tree, sawlog, or individual piece of lumber. A piece of wood 1 foot long, 1 foot wide, and 1 inch thick (144 cubic inches).

**Broadcast:** to spread or apply seed, fertilizer, or pesticides more or less evenly over an entire area. (Helms et al, The Dictionary of Forestry, Society of American Foresters, 1998)

**Canopy:** The more or less continuous cover of branches and foliage formed collectively by the tops, or crowns of adjacent trees.

**Carbon sequestration:** the incorporation of carbon dioxide into permanent plant tissue. (Helms et al, The Dictionary of Forestry, Society of American Foresters, 1998)

**Chip:** a small piece of wood used to make pulp or wood composite or fuel. (Helms et al, The Dictionary of Forestry, Society of American Foresters, 1998)

**Clearcut:** 1. a stand in which essentially all trees have been removed in one operation – *note* depending on management objectives, a clearcut may or may not have reserve trees left to attain goals other than regeneration. 2. a regeneration or harvest method that

removes essentially all trees in a stand. (Helms et al, The Dictionary of Forestry, Society of American Foresters, 1998)

**Contour Map:** A map where each line represents a change in elevation.

**Crop Tree:** A tree identified to be grown to maturity for the final harvest cut, usually on the basis of its location with respect to other trees and its timber quality.

**Cull:** A tree, log, lumber or seedling that is rejected because it does not meet certain specifications for usability or grade. (Helms et al, The Dictionary of Forestry, Society of American Foresters, 1998)

**Culvert:** a device used to channel water. It may be used to allow water to pass underneath a road, railway, or embankment for example. Culverts can be made of many different materials; steel, polyvinyl chloride (PVC) and concrete are the most common. Formerly, construction of stone culverts was common.

**Den Tree:** A living tree with a cavity large enough to shelter wildlife.

**Desired species:** Those species of flora and fauna designated in the landowner's management plan and not known to cause negative impacts on the local environment.

**Diameter Breast Height (DBH):** The diameter of a tree at 4.5 feet above the ground.

**Endangered Species:** Any species of plant or animal defined through the Endangered Species Act of 1976 as being in danger of extinction throughout all or a significant portion of its range, and published in the Federal Register. (Helms et al, The Dictionary of Forestry, Society of American Foresters, 1998)

**Even-Aged Management:** Forest management with periodic harvest of all trees on part of the forest at one time or over a short period to produce stands containing trees all the same or nearly the same age or size.

**Forest owner:** Landowner or designated representative such as, but not limited to, professional resource manager, family member, trustee, etc.

**Forest product:** [Forest Produce] Any raw material yielded by a forest. Generally defined in Forest Acts or Ordinances, and subdivided conventionally into major forest products, i.e. timber and fuelwood, and minor forest products, i.e. all other products including leaves, fruit, grass, fungi, resins, gums, animal parts, water, soil, gravel, stone and other minerals on forest land (F. C. Ford –Robertson, Terminology of Forest Science Technology, Practice, and Products, Society of American Foresters, 1971.

**Forest Stand Improvement:** See timber stand improvement.

**Forest type:** A category of forest usually defined by its trees, particularly its dominant tree species as based on percentage cover of trees, e.g. spruce fir, longleaf-slash pine, Douglas fir.

**Forest vitality:** The health and sustainability of a forest.

**Fuel management:** the act or practice of controlling flammability and reducing resistance to control of wildland fuels through mechanical, chemical, biological, or manual means, or by fire in support of land management objectives. (Helms et al, The Dictionary of Forestry, Society of American Foresters, 1998)

**Group Select:** trees are removed and new age classes are established in small groups – *note* – 1. the width of groups is commonly approximately twice the height of the mature trees with smaller openings providing microenvironments suitable for tolerant regeneration and larger openings providing conditions suitable for more intolerant regeneration – *note* 2. the management unit or stand in which regeneration, growth, and

yield are regulated consists of an aggregation of groups. (Helms et al, The Dictionary of Forestry, Society of American Foresters, 1998)

**Girdling:** Completely encircling the trunk of a tree with a cut that severs the bark and cambium of the tree. Herbicide is sometimes injected into the cut to ensure death of the tree.

**GPS (Global Positioning System) Coordinates:** a commonly hand held, satellite based navigational device that records x, y, z coordinators and other data allowing users to determine their location on the surface of the earth. (Helms et al, The Dictionary of Forestry, Society of American Foresters, 1998)

**Hack-n-squirt:** A tree treatment method where an axe or hatchet is used to make "hacks" (injections) into the tree's cambium layer. A plastic "squirt" bottle is used to spray a specific amount of herbicide into the cuts placed around the tree.

**Harvesting:** the felling skidding, on-site processing, and loading of trees or logs onto trucks. (Helms et al, The Dictionary of Forestry, Society of American Foresters, 1998)

**High conservation value forests (HCVF):** Forests of outstanding and critical importance due to their environmental, social, biodiversity or landscape values. Due to the small scale and low-intensity of family forest operations, informal assessment of HCVF occurrence through consultation with experts or review of available and accessible information is appropriate.

**High-grading:** Cutting only the high-value trees from a forest property, leaving a stand of poor quality with decreased future timber productivity.

**Incentive Programs:** State and federal agencies will offer landowners the opportunity to apply for incentive programs that will provide support and financial assistance to implement forestry and agroforestry related practices through conservation programs. Assistance can also provided for multi-year and permanent easements to conserve forest land to meet program goals. For more information on the federal incentive programs, see Appendix 4.

**Integrated Pest Management:** The maintenance of destructive agents, including insects, at tolerable levels by planned use of a variety of preventative, suppressive, or regulatory tactics and strategies that are ecologically and economically efficient and socially acceptable (Helms et al, The Dictionary of Forestry, Society of American Foresters, 1998). A pest control strategy that uses a variety of complementary strategies including: mechanical devices, physical devices, genetic, biological or cultural management and chemical management (US EPA).

**Intermediate Cut:** Removing immature trees from the forest sometime between establishment and stand harvest to improve the quality of the remaining forest stand. Contrast this technique with a harvest cut.

**Invasive species:** Non-native species whose introduction does or is likely to cause economic or environmental harm or harm to human health (Executive Order 13112 (Feb. 3, 1999)). **Invasive Species:** is a species that is 1) non-native (or alien) to the ecosystem under consideration and 2) whose introduction causes or is likely to cause economic or environmental harm or harm to human health. Invasive species can be plants, animals, and other organisms (e.g., insects, microbes, etc.). Human actions are the primary means of invasive species introductions. (Invasive Species Definition Clarification and Guidance White Paper Submitted by the Definitions Subcommittee of the Invasive Species Advisory Committee (ISAC), Approved by ISAC Apr 27, 2006.)

**Landings:** a cleared area in the forest to which logs are yarded or skidded for loading onto trucks for transport. (Helms et al, The Dictionary of Forestry, Society of American Foresters, 1998)

**Landowner:** Entity that holds title to the property for which the management plan is being written.

**Large woody debris:** any piece(s) of dead woody material, e.g. dead boles, limbs and large root masses, on the ground in the forest stands or in streams. (Helms et al, The Dictionary of Forestry, Society of American Foresters, 1998)

**Log Rules:** A table showing estimated amount of lumber that can be sawed from logs of given lengths and diameters. Two log rules are commonly used in Missouri:

**Doyle Rule** is a simple formula rule used in the eastern United States. It underestimates the amount of lumber in small logs and overestimates large logs.

**International 1/4-inch Rule** is a formula rule allowing 1/2 –inch taper for each 4 feet of length and 1/16-inch shrinkage for each one-inch board. This measure approximates the actual sawmill lumber tally.

**Management plan:** Documents that guide actions and that change in response to feedback and changed conditions, goals, objectives and policies. Management plans may incorporate several documents including, but not limited to, harvest plans, activity implementation schedules, permits, research, etc. For the purposes of the American Tree Farm System® eligible management plans, plan amendments may include letters, notes, and other forms of informal updates in addition to formal plan revisions.

**Mast:** Nuts of trees, such as oak, walnut, and hickory, that serve as food for many species of wildlife.

**Mature Tree:** A tree that has reached the desired size or age for its intended use.

**MBF:** Abbreviation for 1,000 board feet.

**Noxious plant (weed):** a plant specified by law as being especially undesirable, troublesome and difficult to control (Helms et al, The Dictionary of Forestry, Society of American Foresters, 1998)

**Nutrient cycle:** the exchange or transformation of elements among the living and nonliving components of the ecosystem. (Helms et al, The Dictionary of Forestry, Society of American Foresters, 1998)

**Overstocked:** A forest stand condition where too many trees are present for optimum tree growth.

**Overstory:** That portion of the trees in a stand forming the upper crown cover.

**Overstory removal:** the cutting of trees constituting an upper canopy layer to release trees or other vegetation in an understory. (Helms et al, The Dictionary of Forestry, Society of American Foresters, 1998)

**Pesticide:** Pesticides include chemicals commonly known as herbicides and insecticides.

**Pole Timber:** Trees from 6 inches to 12 inches in diameter at breast height.

**Prescribed Burn/Fire:** To deliberately burn natural fuels under specific weather conditions, which allows the fire to be confined to a predetermined area and produces the fire intensity to meet predetermined objectives. A fire ignited by management to meet specific objectives (Helms et al, The Dictionary of Forestry, Society of American Foresters, 1998).

**Pruning:** Removing live or dead branches from standing trees to improve wood quality.

**Pulpwood:** Wood cut primarily for manufacture of paper, fiberboard, or other wood fiber products.

**Qualified contractor:** Forest contractors who have completed certification, licensing, recommended training and education programs offered in their respective states.

**Qualified natural resource professional:** A person who by training and experience can make forest management recommendations. Examples include foresters, soil scientists, hydrologists, forest engineers, forest ecologists, fishery and wildlife biologists or technically trained specialists in such fields.

**Qualified Tree Farm inspector:** A natural resource professional who has completed ATFS required training for certifying forested properties and is eligible to inspect properties on behalf of ATFS. ATFS requires all trained inspectors meet approved eligibility requirements.

**Rangeland** Land on which the historic climax plant community is predominantly grasses, grasslike plants, forbs, or shrubs. Includes lands revegetated naturally or artificially when routine management of that vegetation is accomplished mainly through manipulation of grazing. Rangelands include natural grasslands, savannas, shrublands, most deserts, tundra, alpine communities, coastal marshes, and wet meadows

**Rare species:** A plant or animal or community that is vulnerable to extinction or elimination.

**Reforestation:** the reestablishment of forest cover either naturally (by natural seeding, coppice, or root suckers) or artificially (by direct seeding or planting) – *note* reforestation usually maintains the same forest type and is done promptly after the previous stand or forest was removed. (Helms et al, The Dictionary of Forestry, Society of American Foresters, 1998)

**Regeneration:** The number of seedlings or saplings existing in a stand. The process by which a forest is renewed by direct seeding, planting, or naturally by self-sown seeds and sprouts.

**Regeneration Cut:** Any removal of trees intended to assist regeneration already present or to make regeneration possible.

**Release:** To free trees from competition by cutting, removing, or killing nearby vegetation.

**Riparian:** related to, living or located in conjunction with a wetland, on the bank of a river or stream but also at the edge of a lake or tidewater – *note* the riparian community significantly influences and is significantly influenced by, the neighboring body of water. (Helms et al, The Dictionary of Forestry, Society of American Foresters, 1998)

**Riparian Zone:** The area adjacent to or on the bank of rivers and streams.

**Sapling:** Trees from 2 inches to 6 inches in diameter at breast height.

**Sawtimber:** Trees at least 12 inches in diameter at breast height from which a sawed product can be produced.

**Scale:** The extent of forest operations on the landscape/certified property.

**Seedling:** a young plant.

**Seed-tree Harvest:** A harvest and regeneration method where nearly all trees are removed at one time except for scattered trees to provide seed for a new forest.

**Selection Harvest:** Harvesting trees to regenerate and maintain a multi-aged structure by removing some trees in all size classes either singly or in small groups.

**Shelterwood Harvest:** A harvesting and regeneration method that entails a series of partial cuttings over a period of years in the mature stand. Early cuttings improve the vigor and seed production of the remaining trees. The trees that are retained produce seed and also shelter the young seedlings. Subsequent cuttings harvest shelterwood trees and allow the regeneration to develop as an even-aged stand.

**Single Tree Selection:** Individual trees of all size classes are removed more or less uniformly throughout the stand, to promote growth of remaining trees and to provide space for regeneration. (Helms et al, The Dictionary of Forestry, Society of American Foresters, 1998)

**Site Index:** An expression of forest site quality based on the height of a free-growing dominant or co-dominant tree at age 50 (or age 100 in the western United States).

**Skid:** 1. to haul a log from the stump to a collection point (landing) by a skidder. 2. a load pulled by a skidder. (Helms et al, The Dictionary of Forestry, Society of American Foresters, 1998)

**Skid Trail:** A road or trail over which equipment or horses drag logs from the stump to a landing.

**Skidding:** Pulling logs from where they are cut to a landing or mill.

**Skyline:** harvesting a cableway stretched tautly between two points, such as yarding tower and stump anchor, and used as a track for a block or skyline carriage. (Helms et al, The Dictionary of Forestry, Society of American Foresters, 1998)

**Slash:** the residue, e.g., treetops and branches, left on the ground after logging or accumulating as a result of storm, fire, girdling, or delimiting. (Helms et al, The Dictionary of Forestry, Society of American Foresters, 1998)

**Snag:** a standing, generally un-merchantable dead tree from which the leaves and most of the branches have fallen – *note* for wildlife habitat purposes, a snag is sometimes regarded as being at least 10 inches in diameter at breast height and at least 6 feet tall; a hard snag is composed primarily of sound wood, generally merchantable, and a soft snag is composed primarily of wood in advanced stages of decay and deterioration. (Helms et al, The Dictionary of Forestry, Society of American Foresters, 1998)

**Soil Compaction:** The process by which the soil grains are rearranged, resulting in a decrease in void space and increasing bulk density. Can occur from applied loads, vibration or pressure from harvesting or site preparation equipment. Compaction can cause decreased tree growth, increased water runoff and soil erosion. (Helms et al, The Dictionary of Forestry, Society of American Foresters, 1998)

**Soil map:** A map showing the distribution of soils or other soil map units in relation to prominent physical and cultural features of the earth's surface. (Helms et al, The Dictionary of Forestry, Society of American Foresters, 1998)

**Special sites:** Those areas offering unique historical, archeological, cultural, geological, biological or ecological value. Special Sites include:

- A. Historical, archaeological, cultural and ceremonial sites or features of importance to the forest owner;
- B. Sites of importance to wildlife such as rookeries, refuges, fish spawning grounds, vernal ponds and shelters of hibernating animals;
- C. Unique ecological communities like relic old-growth, springs, glades, savannas, fens and bogs; and
- D. Geological features such as terminal moraines, cliffs and caves.

**Stand:** A group of trees with similar characteristics, such as species, age, or condition that can be distinguished from adjacent groups. A stand is usually treated as a single unit in a management plan.

**Stand Density:** A measure of the stocking of a stand of trees based on the number of trees per area and diameter at breast height of the tree of average basal area.

**Stand Management Recommendations:** The recommended management activities that should be done in that stand, based on the landowner's goals and objectives.

**Stand Structure:** The horizontal and vertical distribution of plants in the forest, including the height, diameter, crown layers, and stems of trees, shrubs, understory plants, snags and down woody debris. (Helms et al, The Dictionary of Forestry, Society of American Foresters, 1998)

**State forestry best management practice(s) (BMPs):** Forestry BMPs are generally accepted forest management guidelines that have been developed by state forestry agencies with broad public stakeholder input.

**Stocking:** An indication of the number of trees in a stand in relation to the desirable number of trees for best growth and management.

**Sustainability:** The capacity of forests, ranging from stands to ecoregions, to maintain their health, productivity, diversity and overall integrity, in the long run, in the context of human activity (Helms et al, The Dictionary of Forestry, Society of American Foresters, 1998).

**Sustainable forest management:** The practice of meeting the forest resource needs and values of the present without compromising the similar capability of future generations (Helms et al, The Dictionary of Forestry, Society of American Foresters, 1998). *Note* – AFF's Standards of Sustainability reflect criteria of sustainability based on the Montreal Process, 1993, and the Pan-European Operational- Level Guidelines (PEOLGs).

**Thinning:** a cultural treatment made to reduce stand density of trees primarily to improve growth, enhance forest health, or recover potential mortality. Types of thinning include: chemical, crown, free, low, mechanical, selection. (Helms et al, The Dictionary of Forestry, Society of American Foresters, 1998)

**Threatened Species:** A plant or animal species that is likely to become endangered throughout all or a significant portion of its range within the foreseeable future. A plant or animal identified and defined in the Federal Register in accordance with the Endangered Species Act of 1976. (Helms et al, The Dictionary of Forestry, Society of American Foresters, 1998)

**Timber Stand Improvement (TSI):** A thinning made in immature stands to improve the composition, structure, condition, health, and growth of the remaining trees.

**Undesirable Growing Stock:** Trees of low quality or less valuable species that should be removed in a thinning.

**Understocked:** Insufficiently stocked with trees.

**Understory:** all forest vegetation growing under an overstory. (Helms et al, The Dictionary of Forestry, Society of American Foresters, 1998)

**Uneven-Aged Management or Stand:** A stand of trees containing at least three age classes intermingled on the same area.

**Visual quality measures:** Modifications of forestry practices in consideration of public view, including timber sale layout, road and log landing locations, intersections with

public roadways, distributing logging residue, tree retention, timing of operations and other factors relevant to the scale and location of the project.

**Volume:** The amount of wood in a tree, stand of trees, or log according to some unit of measurement, such as board foot, cubic foot, etc.

**Watershed:** the area of land where all of the water that is under it or drains off of it goes into the same place. For example the Mississippi River watershed includes all the land that drains into the Mississippi River. This watershed is the fourth largest in the world and includes water from 31 states.

**Wetland:** A transitional area between water and land that is inundated for periods long enough to produce wet soil and support plants adapted to that environment. (Helms et al, The Dictionary of Forestry, Society of American Foresters, 1998)

**Wolf Tree:** A very large, overmature tree that is or was open grown. These trees tend to have large full crowns and numerous branches.

**Woody Debris:** Any piece(s) of dead woody material (e.g. dead tree trunk, limbs, large root ball) on the ground in the forest or in streams. (Helms et al, The Dictionary of Forestry, Society of American Foresters, 1998)

## **Appendix 2 Tax and Business Management**

Woodland owners have to deal with property taxes, income tax for timber harvests and other revenue generating activities, and estate taxes when properties are passed on to future generations. This section was developed to help the landowner consider the tax implication for their property when they are planning for the management of their property.

Some states have special tax programs that can be used by woodland owners to help minimize their tax liability.

Landowners could consider addressing the following in their plan:

1. **Property tax:** The forest management plan should document the current tax status of the property. Their state might have specific property tax programs that you may be eligible to participate in. Please be aware of the program rules and regulations.
2. **Income tax:** Include a statement that timber harvest and other revenue generating activities generally produce a federal and state income tax liability. Tax credits may be available for some management activities.
3. **Federal and State Incentive Programs:** There is tax implication for participating so be aware of those implications.
4. **Estate tax:** Good estate planning can help to lessen tax liability when passing land to heirs and that landowners should seek good planning and tax advice.
5. **Record keeping:** Good record keeping can help landowners manage their assets, increase their revenues, and minimize their tax liability.
6. **Land Use:** Document the land use classifications of the property from the county land use plan.

It is recommended that the landowner works with a professional tax advisor who can assist them in developing this section.

## Appendix 3 Timber Sale Contract Checklist for Private Landowners and Loggers

The following is a checklist of issues private landowners and logging contractors may want to consider on a logging contract. Each of the items should be addressed in a contract to allow for a minimum probability of a dispute. **Issues can be as detailed as both parties find acceptable and economically feasible.**

\_\_\_ **Property location and legal description are clearly defined**

Include Tree Farm certification number if applicable.

\_\_\_ **Property boundaries and harvest units are clearly and accurately marked**

Logging trespass can result in a minimum cost of 3x value of trees.

\_\_\_ **Property ownership is documented and type of ownership is specified**

Either individual, partnerships, corporations, etc.

\_\_\_ **Insurance is documented**

Any contractor working for a landowner must have Commercial General Liability \$1 –million, Loggers Broad Form Property Damage Liability \$1-million, Workers' Compensation \$100,000 or an Independent Contractor Exemption, and Automobile Liability \$1-million. If they do not have these, the landowner will be held liable for any damage or personnel injury that may occur. Insurance can be written to include owner and consulting forester.

\_\_\_ **Access to the property/harvest unit are specified and documented**

To avoid trespass or the disturbance of sensitive area access routes should be clearly delineated. If access across other ownerships is required, written and notarized documentation of access permission should be obtained.

\_\_\_ **Type of harvest is clearly specified for each stand**

Typically trees are marked both at eye level and on the stump, or harvest tree characteristics are defined by species, diameter, crown characteristic, or residual tree spacing.

\_\_\_ **Timing of harvest is specified**

Dates when harvesting and/or other treatments need to be conducted or completed by.

\_\_\_ **Residual property specifications should be defined**

This is as detailed as the landowner and contractor can agree upon. Issues can be the completeness of residual logging debris disposal, burn pile rehabilitation, grass seeding, skid trail rehab, noxious weed control, tree planting, noncommercial thinning, access roads- does the logger need to do repairs and bring them up to a particular standard or are they required to put them to bed and pull up the culverts?

- **Best Management Practices (BMP's) responsibilities are designated**  
Compliance to state BMP's is ultimately the landowners responsibility but should be specified in the contract.
  
  - **Performance bond or contract penalty**  
Create some provision for compensation to the landowner for harvesting activities that deviate from specifications. Having the contractor post a bond is the best protection for the landowner but imposes a risk on the contractor.
  
  - **Method of payment is clearly defined**  
Could include: **Lump sum** is one payment for the entire estimated log volume, this method may over or underestimate actual value but is simple and can be demanded in advance of the actual harvesting. **Payment by unit** is where payment for logs occurs based upon the actual scaled logs at the mill. Either the contractor pays an agreed upon percentage to the landowner or the mill pays agreed upon percentages separately to the contractor and landowner. Downfall is that in cases of salvaging dead and dying trees a delayed harvesting job can result in losses of standing tree value.
  
  - **Method of scaling is defined**  
Either direct scaling or weight scaling are used. Direct scaling tends to be more accurate though each mill may use different defect deductions. Weight scaling works for large volume sales that have trees of similar species and diameter. In general logs should be trucked to the mill quickly following harvest or they lose significant water weight or for most accurate conversions a continuous representative sample of logs should be check scaled and weighed.
  
  - **Notification**  
It is defined if and when the contractor or landowner needs to notify the other party about when activities are to start or end and the type of format – written, e-mail, telephone. This is to avoid issues with blocked access, noise, special sites, etc.
  
  - **Expiration date**  
Any contract should have a defined end date after which the contract is no longer valid.
  
  - **Notarization**  
Any legally binding document should have signatures notarized.
- \*\*\* This is simply a recommended check list compiled from a variety of sources including the Montana Logging Association. Any contract can be challenged. It is always advised that a contract be reviewed by an attorney. You may also want an attorney's fees recovery statement in the document that will allow for recovery of legal fees should a dispute require legal action. \*\*\*

## **Appendix 4: The USDA Farm Bill: What is in it for Woodland Owners**