

Coordinated Planning Criteria and Guidance for Foresters and Natural Resource Professionals in the Development of a Multi-Program Forest Resources Management Plan in Colorado



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Introduction to the Template and Guide

This planning criteria guide was developed to assist you, the forester or natural resource professional, in working with a landowner to develop a multi-program forest resources management plan. You are encouraged to work with the Landowner as a co-creator in the development of their plan. A landowner who is more involved and vested in the development of the plan and has a clear understanding of what their plan outlines will be more likely to successfully implement the management prescribed in the plan to attain the desired condition, and achieve their objectives and identified resource concerns.

While this document serves as a guidance document to the planning professional, there is also a landowner guide that is available to help landowners prepare materials in advance of working with the planning professional. This guide provides useful information for landowners including description on the type of information that is necessary in the development of an effective and successful plan. Additionally, there is a glossary with relevant forestry terms, and a list of informational and reference 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 plan and guides are tools to assist you in working with the landowner.

Why this joint planning approach?

Coordination on planning started with a National level dialogue with the first Joint Forestry Team meeting in 2006, where stakeholders associated with private non-industrialized forest landowner programs and the entities that administer and advocate for the programs sought a need to develop a strategy to better collaborate in addressing resource concerns on working forest lands. The Joint Forestry Team's purpose is to make recommendations that result in coordinated interagency delivery of forestry and conservation assistance for working forests, farms, and ranches. Team participants seek to improve the sustainability of the nation's forests in order to provide optimum levels of public benefits and ecosystem services. This relationship was codified under a Memorandum of Understanding (MOU) in September of 2009. Similarly, about that same time a joint venture between the US Forest Service and American Tree Farm System, and then two years later with Natural Resources Conservation Service and American Tree Farm System, further codified a unified forest planning approach. In September of 2010, the Colorado Joint Forestry Team signed a similar MOU in the spirit of the National MOU. This unified planning approach allows landowners to meet the criteria of several different private non-governmental, State, and Federal 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

Forest Stewardship Program

The Forest Stewardship Program works through State forest agencies 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 technical, and when possible financial assistance to private landowners to implement forestry and agroforestry related practices through the Farm Bill and other discretionary conservation programs. NRCS Forest Management Plans are compatible with the Forest Stewardship Program, Forest Stewardship Planning criteria. 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 technical and financial assistance, through conservation contracts, to assist eligible family forest landowners with structural and management practices on their lands, that address their objectives, and local, state, and national resource concerns; a forest management plan is required to participate.
- *Wildlife Habitat Incentive Program (WHIP)* offers technical and financial assistance for landowners to establish and improve aquatic and terrestrial wildlife habitat; family forestland is eligible and forestry practices are encouraged.
- *Conservation Stewardship Program (CStP)* 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 natural resource professional, but first and foremost 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 as a companion document to this guide and the forest management plan. 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 plan that the landowner can either complete or begin before meeting with their forester or professional planner. 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 historic uses in the area, the benefits and impacts to the local landscape, or presenting a cursory explanation of existing watershed plans, community wildfire protection plans, and similar activities.
- **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, soils map, topographic, 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)
- 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). Ensure the landowner understands and is comfortable with the dates and actions 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, so as to provide a complete context for what the desired conditions are for the property.

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 Programs: State forestry contact or State Forester's office (list of Colorado State Forest Service district offices is available at <http://csfs.colostate.edu/pages/your-local-forester.html>)
- American Tree Farm System: state American Tree Farm System contact (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.

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 to ensure program eligibility and management outcomes are aligned with each Agency's program and mission.

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.

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 \(here\)](#).

GPS coordinates are very helpful in locating relevant maps online.

The entire property does not need to be completely forested and not all of the trees may be eligible for this plan, but cleared land can be included if the landowner intends to plant trees. 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).

Become familiar with program guidelines and policies to determine a property's eligibility to participate.

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. Visit the Environmental Protection Agency or the Colorado, Natural Resources Conservation Service to evaluate in which watershed your property is located:

<http://cfpub.epa.gov/surf/locate/index.cfm>

<http://www.co.nrcs.usda.gov/programs/eqip/eqip.html>

Forest Management Goals

Ownership goals are at the heart of the plan and describe 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 “vision” of their forest. Their goal statements should broadly summarize their vision for their land, but should be specific enough, through a more detailed explanation of desired conditions to know if they are attaining 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 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 land, public forests, etc.). Discuss the climatic characteristics and any historical events that change the conditions of the forest, including fire, insect and disease, weather effects, 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.

Property Maps

Maps are a valuable tool to forest owners and can help promote for the success of developing and implementing their Forest Management Plan. As such, there are several mapping tools available online for the planner to utilize, in the development of a Forest Management Plan. For the property maps, consider using the same base maps for the various items that need to be spatially represented in the management plan. Include the following for the property maps:

1. Delineate the following features using either a contour, or topographic, map and/or an aerial photo (for free aerial photo downloads <http://earth.google.com/>) GIS printout

- Property boundaries, parcels and stands: Be sure to delineate and label the stands and/or management units according to an identifier agreed upon by landowner and professional forester or natural resource professional (i.e. 1, 2, 3; or ponderosa, mixed conifer, aspen; or other descriptors that relate to age, density, landmark or how the landowner identifies a particular area with the corresponding acreage for each management unit. If vegetation type is not the labeled or identified, illustrate the vegetative cover types. Include proximity of neighbors where management activities may have an impact.
- Special sites, including cultural or archaeological sites; aquatic, riparian or wetland features; and features such as buildings, fences, power lines, etc.
- Location of threatened and endangered species present, and their potential habitat.
- Access, including roads and trails, that currently exist and those planned for implementation of management activities.
- Areas of operability, or inoperability.
- Existing practices, future conservation practices, scale, and a directional arrow.
- Use of Ecological Site Descriptions where available
- Soil Information— provide adequate description about present soil types and address limiting factors, or resource concerns, of implementing forest management activities.
 - 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 state agencies also have mapping tools available online, check with the local Conservation District office, Colorado State Forest Service district office, or Natural Resources Conservation service center 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. With respects to stated goals and resource concerns, are the proposed actions needed, and if so, are they technically or programmatically feasible? 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 forest. 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? Is progress measured by whole acres or effective 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.

In the case of NRCS financial assistance, the State Historic Preservation Officer (or delegated authority) will need to be consulted for impacts to any potential ground disturbing practices resulting from forest management activities. A Cultural Resources Review for the site that will be managed must be completed prior to the contract being signed. <ftp://ftp-fc.sc.egov.usda.gov/CO/Forms/ECS/CO-SSC-1.xls>

A landowner can visit www.treefarmssystem.org/woodlandsresources to find their state's information. These resources are also useful:

Colorado Natural Heritage Program—
<http://www.cnhp.colostate.edu/>

Colorado State Register of Historic Properties—
<http://www.historycolorado.org/archaeologists/listed-properties>

Cultural Resource Database—
<http://www.historycolorado.org/archaeologists/cultural-resource-management>

Natural Resources Conservation Service Cultural Resources Directory—
<http://www.nrcs.usda.gov/technical/ECS/culture/newdir.pdf>

State Historic Preservation Officer (SHPO) -
<http://www.historycolorado.org/connect/office-archaeology-historic-preservation>

Colorado State Archives (historical records)—
<http://www.colorado.gov/dpa/doit/archives/>

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.

If there are no archeologically, culturally, historically, geologically, biologically or ecologically valuable sites or high conservation value forests on the property, then a simple statement must be made (i.e. *there are no archeologically, culturally or historically valuable sites on the property*).

Adjacent stand or ownership concerns

How does surrounding management affect their forest 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—is access suitable to implement forestry practices?

Air, Water, and Soil Protection

Soil protection

Include a soils map; it is required for all programs. The primary source of soils information and data can be found through the NRCS web soil survey.

<http://websoilsurvey.nrcs.usda.gov/app/HomePage.htm>

NRCS soils data and associated maps provide a written description of the various soils and their respective proportions and properties found on the property. Provide a description of the soil type, and description to the management activities to be implemented on the ground. Describe the positive aspects, limitations or concerns associated with each soil type where management is to take place. Use the soil information as a decision support tool to better inform management and desired conditions. For example, a soil survey may include issues such as “Woodland Management and Productivity” where the soil type is identified and “management concerns”, related to Equipment Limitation, Seedling Mortality, Wind throw Hazard, and Plant Competition are identified and assigned a slight, moderate, or severe management concern. Consider steep slopes, woody debris retention, nutrient cycling, vehicle travel, soil compaction, flood runoff, livestock issues, silvopastures, and Best Management Practices (BMPs), if applicable.

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/ 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. Utilize Colorado's Forest Roads Manual for guidance.

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? What is the risk level and what method was used to determine the risk? Consider what the landowner should do after a natural disaster occurred, if appropriate.

Rangeland Resources (if applicable)

If there is rangeland or grassy meadows on the property then address that resource in this section. Consultation with a Range Management Specialist is encouraged.

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 and those already on the property, habitat improvement if habitat is inadequate, animal control, den sites, nest boxes, snag retention, access, hunting, and the current state of the habitat. Which area(s) of the property is wildlife habitat management a priority? What assistance did you seek or information did you gather? If this is a stated objective, then what specific planning criteria need to be addressed to effectively manage for wildlife and their habitat?

State and Federal threatened or endangered species - plants or animals

Identify potential or present species, and if present, their habitat. Additionally, consider existing known habitat if species have the potential or are present on the property. Management activities must be done in accordance with federal and state laws.

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. Also consider visiting the Colorado Division of Wildlife at <http://wildlife.state.co.us/> or check out the Wildlife Action Plan at <http://wildlife.state.co.us/WildlifeSpecies/ColoradoWildlifeActionPlan/>.

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, and invasive species. Think about the forest types and only identify pests that are or may likely be present on the property. Assess either qualitatively or quantitatively a pest's extent of presence. How abundant is the 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. Ensure that actions to mitigate or control insects and disease are effective, and meet long-term goals and desired conditions.

Reforestation and Afforestation

Consider natural seedling recruitment, planting, site preparation, and current conditions that might affect regeneration. Ensure that plantings will set forth on a trajectory to meet desired conditions.

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 creating, maintaining or enhancing stand/habitat improvement, fuels 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](http://www.nfpa.org)) 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](http://www.usda.gov), the [US Department of the Interior](http://www.doi.gov), and the [National Association of State Foresters](http://www.nfpa.org).

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

Management Plan Implementation Opportunities and Constraints

Consider available markets for wood products. Assess the social, economic and market conditions on a county level. Consider how these factors may influence the management decisions, as well as the potential for tangible wood products. What is the level of landowner interest, time and financial limitations? Are there any land use ordinances or times of limited seasonal access? What sort of wildlife activity, insect activity, operability due to slope, etc. that may hinder or modify management activities?

Other

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

Forest Inventory

Inventory of forest stands and other natural resources should be well documented and sufficient to adequately evaluate the conditions, both quantitatively and qualitatively. Describe the type of cruise conducted (i.e. variable plot, fixed plot, strip) and how cruise accuracy was determined. . Provide the summary of the overall stand conditions from the inventory if there is more than one management unit.

Stand Level Information

Stand Objectives

Work with the landowner to identify SMART objectives for each stand that relate to the goals that the landowner outlined. SMART objectives are specific, measureable, attainable, realistic and time-oriented. Meeting objectives help meet overarching goals and the desired future condition.

Current/Existing Stand Conditions

General Description: This section would include the history unique to the stand, 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. All inventory data is recommended to be included in the appendix

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

Desired Stand Condition

This section outlines in detail what the stand will look like in the future, based on the landowner's goals 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. Or is the stand to be managed for a specific condition in perpetuity, or an extended planning and management horizon?

It should be noted that for any regeneration practices, if they are to be natural or artificial, and what density and species composition is necessary to meet landowner objectives.

Forest Management Activities

Once targets and detailed descriptions for the desired stand condition have been identified, this section will outline the prescription, or if necessary a range of prescriptions for forest management activities to attain the desired condition for each stand. This ought to focus on details such as species composition, diameter distribution targets, and spatial arrangement.

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, seed tree, and shelterwood), uneven-aged (group selection, single tree selection,), treatment methods (ground based or skyline), time of year, type of harvest; seed tree, multiage, sanitation, etc. Estimate a cutting "entry" cycle to implement intermediate treatments.

Slash management: For this section, discuss how the slash will be addressed after a management activity. Examples include: lop and scatter, jackpot pile, whole tree harvesting, chipping and mastication, pulp. Address the large woody debris and nutrient cycling. If slash is to be piled, lop and scattered, or chip, describe the depth and total area that is allowed to be covered. If slash is to be piled for either wildlife habitat or burn piles provide the dimensions and number of piles per acre.

Post management activities: These could include burning landings, piles, broadcast or seeding roads and landings and/or weed spray roadsides, and post harvesting erosion mitigation

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.

Forestry Practice Specifications

Identify the forestry practices specifications that are recommended for application. Discuss restrictions or special practice requirements or other implementation specifications that meet the landowner's objectives.

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/ and search by your state to find the link to BMPs. For Colorado's BMPs visit <http://csfs.colostate.edu/pdfs/ForestryBMP-CO-2010.pdf>.

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

Practice Operation and Maintenance: In the case of Federal incentives programs and implemented practices, the landowner will be responsible for the operation and maintenance of the practice, for the duration of the practices' lifetime, in the context of forestry, this is usually ten years.

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 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

An activity schedule for at least a 10-year period is required for a plan to qualify as a forest stewardship plan, and for a landowner to be eligible for either the Forest Stewardship Program. For each activity completed, note the date or season completed and describe the management activity. Management activity descriptions should address the purpose of the treatment, and the wood products harvested (types and volumes).

It is advisable to note the incentive program to be used in the planning process. Any additional documentation about an applied incentive program should be maintained within landowner's records for tax purposes and general reference. 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 practice names and codes for NRCS planning and programs:

- Forest stand improvement (666) [Standard](#) and [Specification](#)
- Tree or shrub site preparation (490) [Standard](#) and [Specification](#)
- Tree or shrub establishment (612) [Standard](#) and [Specification](#)
- Forest trails and landings (655) [Standard](#) and [Specification](#)
- Road/Trail/Landing Closure and Treatment (654) [Standard](#) and [Specification](#)
- Woody Residue treatment (384) [Standard](#) and [Specification](#)

- Firebreak (394) [Standard](#) and [Specification](#)
- Fuel Break (383) [Standard](#) and [Specification](#)
- Prescribed burning (338) [Standard](#) and [Interim Specification](#)
- Tree or shrub pruning (660) [Standard](#) and [Specification](#)
- Riparian forest buffer (391) [Standard](#) and [Specification](#)
- Silvopasture establishment (381) [Standard](#) and [Specification](#)
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- Windbreak or shelterbelt establishment (380) [Standard](#) and [Specification](#)
- Windbreak or shelterbelt renovation (650) [Standard](#) and [Specification](#)
- Integrated Pest Management (595) [Standard](#) and [Specification](#)
- Wetland restoration (657) [Standard](#) and [Specification](#)
- Restoration and Management of Rare and Declining Habitats (643) [Standard](#) and [Specification](#)
- Early Successional Habitat Development/Management (647) [Standard](#) and [Specification](#)
- Upland Wildlife Habitat Management (644) [Standard](#) and [Interim Specification](#)
- Access Control (472) [Standard](#) and [Specification](#)
- Access Road (560) [Standard](#) and [Specification](#)

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 other cost-share programs available. Work with your local Colorado State Forest Service or Natural Resources Conservation Service district offices for new or emerging landowner assistance programs.

Appendices

Consider furnishing the management plan with the any of the following as needed:

- Listing of individuals and agencies participating in evaluation and recommendations.
- Bibliography of reference material utilized.
- Glossary.
- Photos (features from the Property Map section, pre-treatment, etc.)
- Annual work plans and landowner assistance practice specifications.
- Other pertinent information.

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

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
- American Tree Farm System: www.treefarmssystem.org
- Your state American Tree Farm System contact: www.treefarmssystem.org/stateleaders
- NRCS: <http://www.nrcs.usda.gov/>
- 2008 NRCS Farm Bill Conservation Programs:
<http://www.nrcs.usda.gov/programs/farmbill/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
- Woodland Owner Resources: <http://www.treefarmssystem.org/woodlandresources/> Provides information on fish, wildlife, biodiversity, special sites and Best Management Practices for your state.
- To find out information on your watershed, visit:
<http://cfpub.epa.gov/surf/locate/index.cfm>
- Read [Choosing a Forestry Contractor](#) for advice on how to pick a contractor.
- The [CSFS Library](#) is another source of publications applicable to the landowner and useful to prepare a forest management plan.
- **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 trees 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 Condition: A timeless yet measurable outcome that is identified to meet the landowner's objective and resource concern. Provides guidance to implement appropriate management activities and through monitoring understand if objectives have been met.

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.

Diameter Distribution: Describes stand structure by number of stems represented in specific size and/or age classes, usually increasing numeric class in a management appropriate increment, expressed on a trees per size class, per acre basis.

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 Selection: 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): 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 are 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 towards a desired condition to effectively meet the landowners objectives and resource concerns. The management plan can 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, and 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 process by which a forest is renewed by direct seeding, planting, or naturally by self-sown seeds and sprouts. Usually expressed by the number of seedlings or saplings existing in a stand on a per acre basis

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 in small management units, where Skid Trails are tributaries of Haul and Forwarding roads on larger units.

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 and soil strength. Can occur from applied loads, vibration or pressure from harvesting or site preparation equipment, and can occur naturally, for example, where puddling occurs. 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: a watershed is the divide separating one drainage area from another, where the area in which all surface waters flow to a common point. Watersheds are commonly characterized in “Hydrologic Units”, based on size in a tributary to from site specific to increasingly larger watersheds. 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, over mature 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 is 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

No person in the United States shall, on the ground of race, color or national origin, be excluded from participation in, be denied the benefits of, or be subjected to discrimination under any program or activity receiving Federal financial assistance. 42 U.S.C. 2000d.