American Tree Farm System® Inspector Training Workshop



April 9, 2015 Lexington, KY
Pam Snyder and Connie Woodcock, Kentucky Division of Forestry

GROWING STEWARDSHIP FROM THE ROOTS

The American Tree Farm System Mission

To promote the growing of renewable forest resources on private lands while protecting environmental benefits and increasing public understanding of all benefits of productive forestry.

The American Tree Farm System grows stewardship from the roots

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Inspector Training Agenda

- Introduction to Tree Farm
- 2015 2020 Standards & Guidelines
- The Inspection Process applying the Standards
- Tools & Benefits of Tree Farm

American Tree Farm System (ATFS)

Program of the American Forest Foundation

(AFF)



American Forest Foundation

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American Tree Farm History

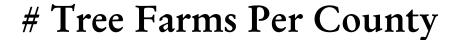
- "Tree farming" term 1940 and The first Tree Farm was established in 1941 by Weyerhaeuser in Montesano, WA.
- The Montreal Process is the basis for all current forest certification systems.
- By 1998, the Tree Farm System needed to become a certification organization, and the 2000 Standards of Sustainability were developed

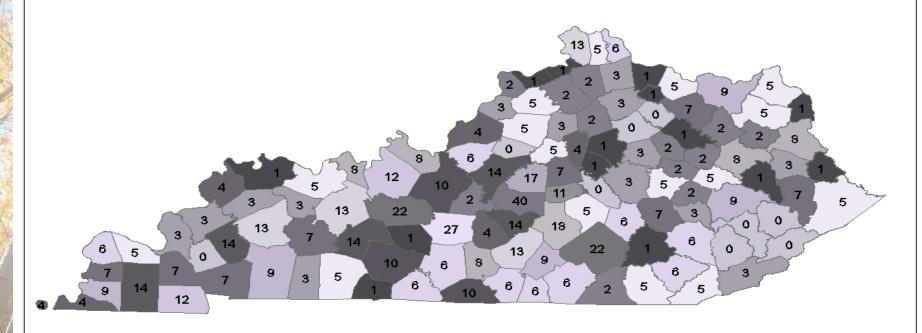


ATFS History



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720 Tree Farms Statewide

163,287 Total Acreage

65 Tree Farm Inspectors



Why become a tree farmer?

- Certification
- Recognition
- Resources

Chain of Custody





- Private or public ownership
- No publicly traded companies
- Nonindustrial (small business exception)
- Agree to conform to Standard
- Agree to participate in assessments

Landowner Acreage Eligibility

- 10 10,000 contiguous acres for certification through a State Tree Farm committee
- Contiguous parcels defined as boundary line or corner point held under the same ownership name.
- Forested acres may include non-forested features (food plots, water resources) that are integrated with the forest system
- 10,000-20,000 parcels may be eligible under IMG or individual 3rd party certification.

ATFS Certification Options

Ownership Type	ATFS Program Enrollment Options		
			Individual
	State		3rd-Party
	Committee	IMG	Certificate
Individual owner - 10 to 10,000 ac.	X	X	X
Individual owner - 10,000 to 20,000 ac.		X	X
Small Business - 10 to 10,000 ac.	X	X	X
Small Business - 10,000 to 20,000 ac.		X	X
Public (except State) - 10 to 10,000 ac.	X	X	X
Public (except State) — 10,000 to 20,000 ac.		X	X
State Government – 10 to 20,000 ac.		X	X
TIMO/REIT - 10 to 20,000 ac.		X	

2015-2020 Standards of Sustainability Development

- 2015-2020 Independent Standards Review Panel (ISRP)
 - o At the direction of the AFF Board of Trustees
 - o Two rounds of comments
- Sustainable Forest Management
- Credibility
 - o PEFC endorsement

Highlights of Changes

- Standardized language
 - "Must" replaced with "Shall"
- Emphasis on objectives and activities
 - Related to management plans
 - Use of adaptive innovative approaches
- Expansion of BMPs
 - Standards and guidance enhanced
 - Related to air, water, soil, and site quality

Highlights of Changes, Cont'd

- T&E species
 - Clarified obligations for protection
- Forest Health
 - Promote broader understanding
 - Stresses resilience to multiple stressors and disturbance
- Forests of Recognized Importance (FORI)
 - Formerly High Conservation Value Forests
- Use of Contracts
 - Should seek and engage qualified contractors
 - Should use and retain contracts

2015-2020 AFF Standards of Sustainability & Guidelines

- Standards Prologue & use
- 8 Standards and Standards of Sustainability Document
- Glossary
- 2015 Eligibility Guidance Document
- Responsibility for Conformance

Standard 1 - Commitment to Practice Sustainable Forestry

Standard 2 - Compliance with Laws

Standard 3 - Reforestation and Afforestation

Standard 4 - Air, Water and Soil Protection

Standard 5 – Fish, Wildlife, Biodiversity and Forest Health

Standard 6 - Forest Aesthetics

Standard 7 - Protect Special Sites

Standard 8 – Forest Product Harvest and Other Activities



Bold type: Defined in the glossary.

Standard

Underlined "shall" is a required element.

The Standard is the overarching guiding principle.

Performance Measure

The Performance Measure is the conformance shown through Tree Farmer's actions.

Indicator

An Indicator is an example of Tree Farmer's action.

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Key Phrases

Shall vs.
Should

Size
Scale
Intensity

Performance Measure 1.1 - Landowner shall have and implement a written forest management plan consistent with the size of the forest and the scale and intensity of the forest activities.



Indicator 1.1.1 – Management Plan Requirements:

- Clearly stated objectives
- Active and adaptive
- Reflect current knowledge of forest science & management



Indicator 1.1.2a – Management Plan Requirements:

- Describe current forest conditions
- Landowner objectives
- Management activities & schedule
- Map depicting all significant forest-related resources



Indicator 1.1.2b – Management plans

Required Plan Resource Elements

- Forest health
- Soil
- Water
- Wood & fiber production
- T&E species
- Special sites
- Invasive species
- Forests of Recognized Importance (FORI)



Indicator 1.1.2c – Management plantsditional Plan Resource Element Considerations

- Prescribed fire
- Wetlands
- Desired species
- Recreation
- Aesthetics
- Biomass
- Carbon



Indicator 1.1.3 – Monitor for

changes itoring

- Notes: Written Record
- Updates
 - Management Plan Addendum
- Plans considered current:
 - Landowner objectives
 - Conditions on ground



Performance Measure 2.1 - Landowner shall comply with all relevant federal, state, county and municipal laws, regulations and ordinances governing forest management activities.



Indicator 2.1.1

Landowner <u>shall</u> comply with all relevant laws, regulations and ordinances and will correct conditions that led to adverse regulatory actions, if any

Indicator 2.1.2

Landowner **should** obtain advice from appropriate qualified natural resource professionals or qualified contractors who are trained in, and familiar with, relevant laws, regulations and ordinances.

Forestry Laws in Kentucky

http://forestry.ky.gov/forestrypublications



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Performance Measure 3.1 – Reforestation or Afforestation shall be achieved by a suitable process that ensures adequate stocking levels



Indicator 3.1.1

Harvested forest land <u>shall</u> achieve adequate stocking of desired species reflecting the landowner's objectives, within five years after harvest, or within a time interval as specified by applicable regulation.

Performance Measure 4.1 - Landowner shall meet or exceed practices prescribed by state forestry Best Management Practices (BMPs) that are applicable to the property.



Indicator 4.1.1

Landowner <u>shall</u> implement specific state forestry BMPs that are applicable to the property.

Indicator 4.1.2

• Landowner <u>shall</u> minimize road construction and other disturbances within riparian zones and wetlands.

Performance Measure 4.2 - Landowner shall consider a range of forest management activities to control pests, pathogens, and unwanted





Indicator 4.2.1

Landowner **should** evaluate alternatives to pesticides for the prevention or control of pests, pathogens and unwanted vegetation to achieve specific management objectives.

Indicator 4.2.2

Pesticides used <u>shall</u> be EPA-approved and applied, stored and disposed of in accordance with EPA-approved labels and by persons appropriately trained, licensed and supervised.

Performance Measure 4.3 - When used, prescribed fire shall conform with landowner's objectives and pre-fire planning.



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Indicator 4.3.1

Prescribed fire <u>shall</u> conform with the landowner's objectives and state and local laws and regulations.

Performance Measure 5.1 – Forest Management activities shall protect habitats and communities occupied by threatened & endangered species as required by law



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Indicator 5.1.1

Landowner <u>shall</u> confer with natural resource agencies, state natural resource heritage programs, qualified natural resource professionals or review other sources of information to determine occurrences of threatened or endangered species on the property and their habitat requirements.

Indicator 5.1.2

Forest management activities <u>shall</u> incorporate measures to protect identified threatened or endangered species on the property.

Who to contact in Kentucky?

Kentucky Department of Fish and Wildlife Resources

http://fw.ky.gov

US Fish and Wildlife Service

http://www.fws.gov/endangered

Invasive plants & insects:

http://www.invasivespeciesinfo.gov/unitedstates/ky.shtml

Forest pests and pathogens:

http://forestry.ky.gov/foresthealth/Pages



Performance Measure 5.2 – Landowner should address the desired species and/or desired forest communities



Indicator 5.2.1

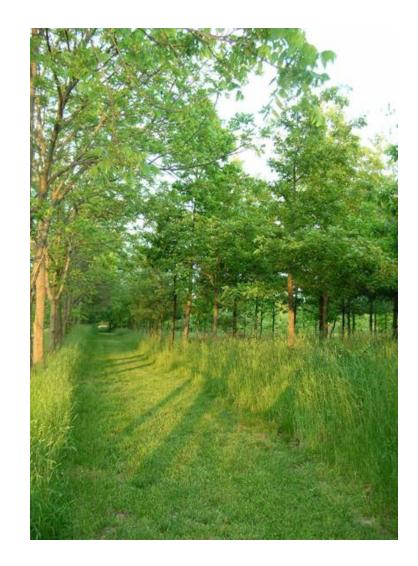
Landowner should consult available and accessible information on management of the forest for desired species and/or forest communities and integrate it into forest management



Performance Measure 5.3

- Landowner should make practical efforts to promote forest health.

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Indicator 5.3.1

Landowner **should** make practical efforts to promote forest health, including prevention, control or response to disturbances such as wildland fire, invasive species and other pests, pathogens or unwanted vegetation, to achieve specific management.



Performance Measure 5.4 - Where present, forest management activities should maintain or enhance forests of recognized importance.



Indicator 5.4.1

Appropriate to the scale and intensity of the situation, forest management activities should incorporate measures to contribute to the conservation of identified forests of recognized importance



Performance Measure 6.1 - Landowners should manage for visual impacts consistent with size, scale and intensity of activities.





Indicator 6.1.1

Forest management activities **should** apply visual quality measures compatible with appropriate silvicultural practices.



Performance Measure 7.1 – Forest Management activities shall consider and maintain any relevant special sites.



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Indicator 7.1.1

Landowner <u>shall</u> make a reasonable effort to locate and protect special sites appropriate for the size of the forest and the scale and intensity of forest management activities.



What is included in Special Sites?

Historical

Archeological

Cultural

Geological

Biological

Ecological

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Performance Measure 8.1 – Landowner should use qualified natural resource professionals and contractors



Indicator 8.1.1

Landowner **should** seek qualified natural resource professionals and qualified contractors.



Indicator 8.1.2

Landowner should engage qualified contractors who carry appropriate insurance and comply with appropriate federal, state and local safety and fair labor rules, regulations and standard practices



Indicator 8.1.3

Landowners **should** retain appropriate contracts or records for forest product harvests and other management activities to demonstrate conformance to the Standards.



Performance Measure 8.2 – Landowner shall monitor harvests and other activities to ensure conformance with objectives



Indicator 8.2.1

Harvest, utilization, removal and other management activities <u>shall</u> be conducted in compliance with the landowner's objectives and to maintain the potential of the property to produce forest products and other benefits sustainably

Conducting an Inspection



Two levels of Certification

Third-Party Certification (External Monitoring)

Accredited Certification Bodies

(PwC, BV, NSF)

Perform third-party certification assessments for the 4 Tree Farm regions



Internal Monitoring (REQUIRED Sample)

State Tree Farm Committee

Trained inspectors verify landowner conformance (You)

Three Types of Inspection

- 1. Initial
- 2. Required sample
- 3. 5 year interval or

Adopted KY Telephone Inspection process



Inspections are essential to the ATFS Internal Monitoring System

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Tree Farm Inspection Protocol

Inspection protocol

- 1. Review Eligibility for Tree Farm Participation
- 2. Review AFF Standards
- 3. Inspect management plan
- 4. Inspect property

Tree Farm Inspection Protocol

- 1) Review eligibility criteria
 - Size?
 - Ownership?
 - Willing participant?





Tree Farm Inspection Protocols

- 2) Review 2015-2020 AFF Standards
 - Must meet all Standards to be certified
 - Record activities that support Certification





Tree Farm Inspection Protocols

- 3) Inspect Management Plan
- All core elements addressed?
- Additional considerations addressed if appropriate?
- Schedule of activities still applicable?
- Addendum or updates?

- 4) Inspect the Property
 - Recent management
 - Unique features
 - Ground truth the map
 - Areas of emphasis
 - Landowner questions
 - Document findings

When should a management plan be updated?

- Changes to forest condition
- Changes to landowner objectives
- Changes to owners, ownership or acres
- Natural disasters
- Insect and disease outbreaks



Three Recommendation Options:

- Certified Tree Farm (certification)
- 2. Pioneer Tree Farm (participation)
- 3. Not appropriate for certification through ATFS (de-certification) specify



Re-inspection by Phone can only be done using the following Rules.

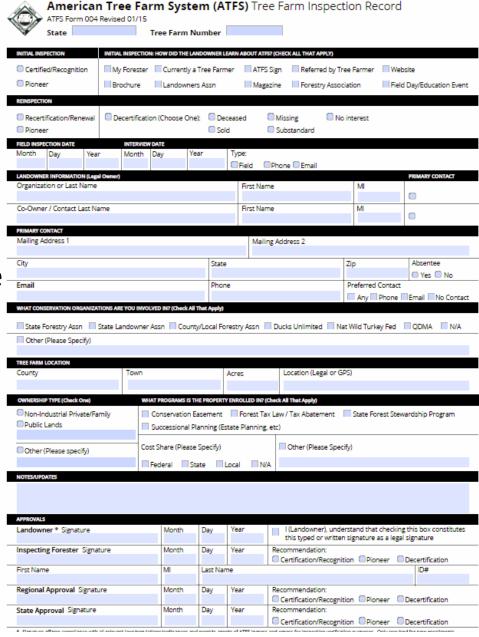
- Permission of legal owner
- 004 Form completed
- On the ground within 180 days.
- No management activity since visit.
- KY Telephone Inspection Process



ATFS Tree Farm Inspection Record (004 Form)

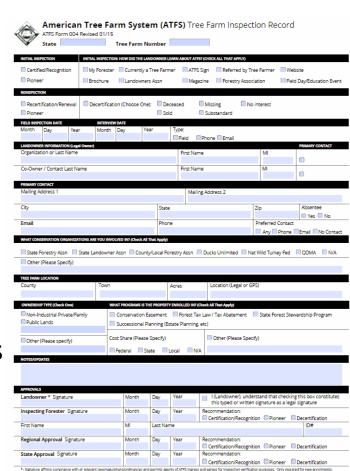
- Key to Certification under ATFS
- Recently revised for the new standards
- All inspections must be done with this form starting 3/15
- You must be trained to the 2015-2020 Standards to use this form

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Page One

- All about the Landowner and his/her property
 - Contact information is Key!
- Inspection outcome
- Signatures of approval
- All Sections on this page are REQUIRED
- Form will be returned to you if anything is missing



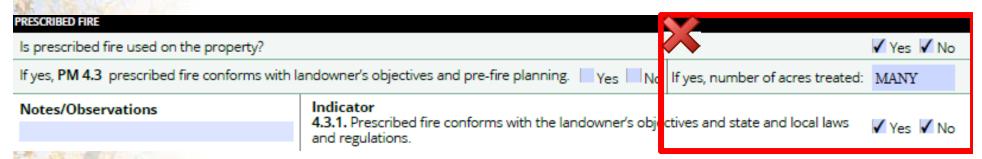


Improved Standards Checklist

STANDARD 2. COMPLIANCE WITH LAWS				
PM 2.1 Landowner complies with all relevant federal, state, county and municipal laws, regulations and ordinances governing forest management activities.			O Yes O No	
Notes/Observations	Indicator 2.1.1. Landowner corrects conditions that led to adverse regulatory actions, if any.		Yes No	
	2.1.2. Landowner should obtain advice from appropriate qualified natural resource professionals or qualified contractors who are trained in, and familiar with, relevant laws, regulations and ordinances.			Yes No
STANDARD 3. REFORESTATION AND AFFORESTATION				
STANDARD 3. REFORESTATION AND AFFORESTATION Has the property been reforested or afforeste	ed in the past 5 to 10 years? (I	f no, skip to Standard 4: Air, Water a	and Soil Protection)	○Yes ○No
			<u> </u>	Yes No
Has the property been reforested or afforeste	Indicator 3.1.1 Harvested forest land		red species reflecting the	Yes No

- Not all questions are required, depends on what is happening on the ground
- Example: All questions in Standard 2 Section are required. All questions in Standard 3 are required if the property has been reforested or afforested in recent years.

Additional Tips



- Use State abbreviation in when asked for State. (Texas should be written as TX)
- Date format is always mmddyyyy

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- Acres should be written as whole numbers
- When asked for a number of something (acres) do not use text, only numerical
- If the question is a yes or question, do not choose yes and no.

Make sure to answer ALL of the required fields for the property

How To Obtain A 004 Form

- Several Options
- Online in the inspector's corner-resources
 http://www.treefarmsystem.org/inspectorscorner
- Your local state committee representative
- ATFS Inspector's app



The ATFS Inspection App





MEET OUR NEW APP

- A quick and easy way to complete your ATFS inspections
- Download it to your smartphone or tablet, then it's always with you
- Complete an inspection even if you don't have an internet connection, just synch the app when you are back online

DOWNLOAD THE APP TODAY

See our instructions for downloading the app for iPhone, iPad and Android.



DOWNLOAD INSTRUCTIONS

Get instructions for downloding the app and configuring it for your smartphone or iPad.

GET THE APP

APP GUIDELINES

Before using the ATFS Inspector App, there's a few things you need to keep in mind. Please read and follow our best preactices for using the new app.

READ GUIDELINES

STARTING THE APP

Learn how to launch and log in to the ATFS Inspection App on your iPhone, iPad or Android.

READ MORE

treefarmsystem.org/app

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Management Plan Template and Addendum

- ATFS offers tools for foresters and landowners:
 - Template (NRCS, Forest Stewardship, ATFS)
 - Management PlanAddendum

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My Land Plan



Tools & Benefits For Landowners and Foresters

Benefits for Landowners

- Education
- Information
- Communication
- Community
- Certification
- Representation





Tools to Share With Landowners:

- Management Plan Template & Addendum
- Woodland Owner Resources
- ATFS Webinars
- Family Forests Network & Online Updates
- Woodland Magazine
- Forests & Families Newsletter
- Brochures: Tree Farm, Farm Bill, etc.
- Tree Farm Signs
- ATFS Blog, Facebook, and Twitter
- My Land Plan

Family Forest Action Network

- Stay up-to-date on current legislation that will affect you and woodland owners
- Have your voice heard on Capitol Hill
- Join our Grassroots Action Network:
 http://www.forestfoundation.org/actionnetwo
 rk

Tree Farm Signs

- Two types available:
 - Certified Family Forest
 - Certified Tree Farm
- Landowners can purchase additional signs online: www.treefarmsystem.org







/atfssigns

Benefits for Foresters

- Contacts
 - Landowners and foresters
- Recognition
 - Commitment to Sustainable Forestry
- Resource Efficiencies
 - SFI-SIC
 - Landowner outreach
- Communications





Volunteer Recognition

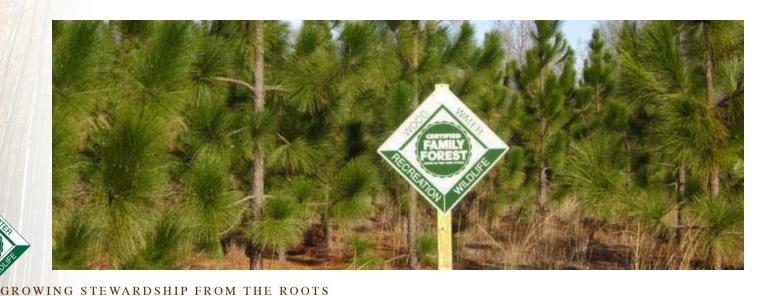
- Tree Farmer and Inspecting Forester of the Year
 - State
 - Regional
 - National
- Hard Hat Awards
- Field Leadership Award





What we covered:

- Tree Farm History & Overview
- 2015-2020 AFF Standards
- Conducting an Inspection.
- Tools & Benefits



Where to go with questions?

- Kentucky Tree Farm Program website
- ATFS website
- ATFS Inspector's Corner
- Sightline & Sightline Express newsletters
- 2015 Eligibility Guidance Document
- 2015-2020 Standards for Sustainability
- Send Questions to inspectors@forestfoundation.org

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Kentucky Tree Farm Committee Contacts

 Pam Snyder, Forest Management Chief, KDF

pamela.snyder@ky.gov

- Michelle Brewer, TF Administrator, KFIA <u>michele@kfia.org</u>
- Bob Bauer, Executive Director, KFIA kfiabob@aol.com

Conclusion

