

# Virginia Department of Forestry (VDOF) Strategic Plan

*November 2020*





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# Goal 1: Forest Resource Protection

*Protect the forest resources and the citizens of the Commonwealth from wildfire and reduce impacts to the forest from other threats.*

## Goal Summary and Alignment

*Healthy forests are essential to the economic and environmental health of the Commonwealth and its citizens. Protecting our current healthy forest resource is the most basic duty of the agency. The range of threats facing the forest will require action by all elements of the agency.*

*This goal aligns directly with the Agency's mission to protect the forest resources and the National State and Private Forest Priorities number 2, Protect Forests from Threats and number 1, Conserve and Manage Working Forest Landscapes for Multiple Values and Uses.*

## **Objective 1A: Ensure the agency maintains an appropriate and efficient level of readiness to respond to wildfire and other emergencies and provide support to cooperating response agencies.**

VDOF will maintain its role as the premier wildfire prevention and fighting agency in the Commonwealth and will build partnerships that expand its ability to meet the challenges of emergency response across the state.

### Strategies

- S1A-1. Capitalize on the Virginia Interagency Coordination Center to increase agency readiness, situational awareness and personnel safety in emergency response situations across the Commonwealth.
- S1A-2. Distribute state and federal grant funding to fire departments across the Commonwealth to increase the wildfire response capacity of Virginia's fire service.

### Measures

- M1A-2 Percentage of eligible rural volunteer fire departments receiving available state and federal financial assistance.
- M1A-3 Percentage of wildfire responses that are thirty (30) minutes or less.
- M1A-4 Percentage of fires contained during the first 24 hours.



## **Objective 1B: Ensure functional woodlands remain a part of Virginia's landscape by protecting forestland from fragmentation or conversion to non-forest uses.**

Interconnected and intact forests provide the Commonwealth with the greatest range of economic, environmental, and social benefits. The Agency will reinforce its position as the leading forestland conservation agency in the Commonwealth to ensure a sustained flow of natural goods and services for current and future generations.

### **Strategies**

- S1B-1. Promote high conservation value (HCV) forestland retention through landowner programming and incentives and locality engagement.
- S1B-2. Protect large blocks of connected forestland with multiple conservation values using a variety of approaches.
- S1B-3. Emphasize and negotiate the avoidance or mitigation of forest fragmentation and loss as a result of proposed large-scale infrastructure projects.
- S1B-4. Effect intergenerational land transfer planning by landowners that keeps family forestland intact and in forest.
- S1B-5. Integrate forest management planning during the annual easement monitoring process to increase accomplishment of landowner and resource goals.

### **Measures**

- M1B-1. Number of acres protected from conversion to development.
- M1B-2. Number of families who have taken steps to maintain their forestland intact through intergenerational land transfer planning.

## **Objective 1C: Be proactive in preventing the loss of forest resources and other property due to wildfire and other natural and human-caused events.**

VDOF will be the lead agency in protecting forests from wildfire. In addition, we will serve the Commonwealth as a member of the Virginia Emergency Response Team (VERT).

### **Strategies**

- S1C-1. Enhance landscape-level emphasis on wildfire prevention and mitigation.
- S1C-2. Implement programs and projects to monitor and protect forests from damage caused by insects, diseases, and non-native invasive plants and work with partners to disseminate forest health risk information.
- S1C-3. Work with the forestry community to support legislation to address timber theft.
- S1C-4. Establish a timber theft response program that includes an internal reporting component, an investigatory process, and an educational outreach component targeting landowners, prosecutors, and law enforcement agencies.
- S1C-5. Expand efforts to increase acres of key diminished tree species within their historic range.





## Measures

- M1C-1. Number of communities at a reduced level of wildfire hazard through participation in agency prevention programs.
- M1C-2. Number of forest health surveys completed.
- M1C-3. Number of landowners who are assisted by the Department of Forestry in response to suspected timber theft.
- M1C-4. Number of educational programs delivered that focus on timber theft.
- M1C-5. Number of diminished species projects completed (longleaf pine and shortleaf pine).

## Goal 2: A Strong Forest Economy

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*Support a strong forest economy by ensuring a productive and sustainable resource and promoting diverse markets for Virginia's forest products.*

### Goal Summary and Alignment

*Our forests and the markets they support are essential to the economic well-being of all Virginians. Given the competing demands placed on our forests and the many factors impacting them, science-based management is the key to ensuring sustainable, healthy forest resources. While landowners have many reasons for owning and maintaining forestland, income from that land is critically important to support reforestation and management work and to keep forests from being converted to other uses.*

*This goal aligns directly with the Agency's mission to protect and enhance Virginia's forest resources and the National State and Private Forest Priorities number 1, Conserve and Manage Working Forest Landscapes for Multiple Values and Uses and number 3, Enhance Public Benefits from Trees and Forests.*

### Objective 2A: Provide more proactive forest management planning to increase production and ensure resource sustainability on private and public lands.

In our ongoing efforts to provide the widest range of options for all forest landowners, it is imperative that the agency seek to provide forest management guidance well prior to harvesting and other management activities taking place.

### Strategies

- S2A-1. Identify and implement innovative ways to reach a broader group of forest landowners, especially prior to significant management decisions.



- S2A-2. Use forest health and wildlife management information and practices as a means to motivate landowners to plan and implement better forest management practices on their forestlands.
- S2A-3. Continue to increase the availability and productive potential of VDOF pine seedlings.
- S2A-4. Increase collaboration with state and federal agency partners to increase the application of sound forest management on public lands.
- S2A-5. Establish a stakeholder group to guide implementation of the Hardwood Sustainability Strategy.

## Measures

- M2A-1. Number of management practices implemented by previously unengaged landowners.
- M2A-2. Number of hardwood management projects implemented.
- M2A-3. Weighted productivity rating (PRS) value of seedlings produced in DOF nurseries.
- M2A-4. Forest Inventory and Analysis (FIA) growth/drain ratio for pine sustainability.
- M2A-5. Number of acres of trees successfully regenerated in Virginia.

## Objective 2B: Enhance the timber harvest inspection program to better help loggers protect water quality.

VDOF's exemplary timber harvest inspection program provides public assurance that timber harvests have minimal impact on water quality and support the sustainability of the forest industry in Virginia. The agency will look for innovative methods and technologies to make the monitoring of more than 5,000 annual harvest sites more efficient and effective.

## Strategies

- S2B-1. Develop an ongoing water quality training program that enables the consistent application of and compliance with Virginia's Silvicultural Water Quality Law.
- S2B-2. Incorporate new technologies in the harvest inspection and Best Management Practices monitoring process.
- S2B-3. Seek consistent, dedicated funding for the harvest Best Management Practices implementation program.

## Measures

- M2B-1. Percentage of harvested tracts with written pre-harvest plans.
- M2B-2. Statewide Best Management Practices implementation percentage.
- M2B-3. Number of loggers trained annually.



## **Objective 2C: Expand VDOF's role in support of Virginia's forest economy to develop new income streams for landowners and pursue new markets for existing producers and additional manufacturers for underutilized forest products.**

A strong, diverse forest economy supports healthy forests by providing an incentive for forest landowners to maintain and invest in their forests. The more options that landowners have for generating income from forestland, the more likely they are to maintain it. Virginia is part of a competitive global forest products economy and we need dedicated expert resources to support existing producers and to proactively seek out new markets for underutilized forest products.

### **Strategies**

- S2C-1. Provide technical expertise in support of state programs related to exports and increased economic development.
- S2C-2. Develop a forest industry roundtable to identify issues and opportunities and develop plans to grow and diversify Virginia's forest products markets.
- S2C-3. Increase agency capacity to analyze and report on forest resource and market information to support economic development.

### **Measures**

- M2C-1. Number of new and/or expanding forest-related businesses or markets.
- M2C-2. Number of economic development project assists involving other state and local agencies.

## **Goal 3: Increased Benefits from Trees and Forests**

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*Increase the social, environmental, and economic benefits provided by trees and forests.*

### **Goal Summary and Alignment**

*Trees and forests are natural assets that build a sense of community character and place, while also providing ecosystem services, such as climate mitigation, water resource protection, wildlife habitat and timber products. The level of benefits received is directly related to the extent of forest and tree cover that is established and maintained across the landscape.*

*This goal aligns directly with the Agency's mission to enhance Virginia's forest resources and the National State and Private Forest priority number 1, Conserve and Manage Working Forest Landscapes for Multiple Values and Uses and number 3, Enhance Public Benefits from Trees and Forests.*



## **Objective 3A: Expand the canopy of healthy tree cover to improve the quality of life in Virginia communities.**

We will encourage and support sustainable community forestry programs that promote green space, tree canopy, and the awareness of the benefits of trees to human health and well-being.

### **Strategies**

- S3A-1. Support planning efforts to incorporate green space into communities.
- S3A-2. Support projects that expand urban tree canopies and improve their long-term maintenance and health.
- S3A-3. Promote the connection between community forests and human health.
- S3A-4. Increase life cycle management of trees to address urban wood utilization/waste.

### **Measures**

- M3A-1. Number of communities that have urban wood use plans.

## **Objective 3B: Enhance the capacity of forests and trees to provide water quality and quantity.**

The use of low-impact development practices including tree planting and forestland conservation will improve water quality and quantity in Virginia's communities.

### **Strategies**

- S3B-1. Improve water quality from selected forested watersheds through collaborative partnerships.
- S3B-2. Develop new strategies and identify additional resources to increase riparian buffer plantings on high-priority sites.
- S3B-3. Continue to collaborate with partners to incorporate working forestland conservation in the Chesapeake Bay restoration strategies.

### **Measures**

- M3B-1. Number of priority watercourses on which agency-established riparian buffer goals are achieved.

## **Objective 3C: Promote and expand the use of prescribed fire to meet multiple management and training objectives.**

Prescribed fire is an important tool for the management of many forest ecosystems in Virginia, as well as a tool used to increase the economic potential of many forestlands. In many areas, it has been greatly underutilized to the general detriment of the resource. With the assistance of willing partners, the Department of Forestry will seek to expand its use in the appropriate ecosystems and locations.

### **Strategies**

- S3C-1. Work with cooperators to increase the number of trained personnel and other resources available to perform prescribed burning.



## Measures

- M3C-1. Acres of prescribed burning conducted in the Commonwealth.

# Goal 4: Human Capital Management

*Attract, develop, and sustain the agency workforce to carry out our mission.*

## Goal Summary and Alignment

*Recruit, retain and equip an inclusive professional workforce to succeed across all levels of governance amid 21st century challenges in an adaptive workplace environment. A trained and expert workforce will allow VDOF to actively work towards accomplishing the three National State and Private Forestry Priorities.*

### **Objective 4A: Recruit and retain an inclusive workforce that is engaged with the Agency's mission.**

Our ability to recruit and retain a talented workforce derives from immediate involvement and engagement of all agency functions early in an employee's career. The most effective way an employee embraces the mission is when his/her occupational career path is clearly intertwined with agency operations, and contingent on individual performance.

## Strategies

- S4A-1. Review and revise the New Employee Development Guide and program to effectively standardize onboarding.
- S4A-2. Implement occupational career paths contingent upon increased KSAs (knowledge, skills, and abilities), performance standards, and qualifications that align pay beyond state-driven salary adjustments.
- S4A-3. Implement an agency liaison team to support the Commonwealth's Talent Acquisition Strategy to attract a skilled and diverse workforce, with increased outreach efforts to veterans and minorities.

## Measures

- M4A-1. Percentage of the workforce classified as veteran.
- M4A-2. Percentage of the workforce classified as minority.

### **Objective 4B: Implement relevant and timely training programs and policies that develop technical competence while sustaining safe work environments.**

The strength of our agency lies in our ability to deliver educational and training programs that not only allow each individual employee to maximize his/her technical expertise and professional



development, but also inculcate a culture of safety across all agency functions regardless of operational expectations.

### Strategies

- S4B-1. Implement a training and development program that centers on an occupational career path through attainment of competencies.
- S4B-2. Implement a formal safety program that empowers all employees to put safety first.
- S4B-3. Conduct a comprehensive review of the agency's law enforcement programs.

### Measures

- M4B-1. Number of safety and safety program non-compliance incidents.

## Objective 4C: Establish an employee succession plan, anchored by a mentorship culture.

State of Virginia agencies are expected to experience an influx of retirements over the next five years. Currently, VDOF has nearly 20 percent of its workforce eligible for retirement, and by 2022 it is expected to climb to above 34 percent. As a result, it is necessary to implement timely strategies that reduce degraded operations by ensuring institutional knowledge is shared across all levels, thus moving the agency forward.

### Strategies

- S4C-1. Pair new employees with mentors to navigate the new employee guide and program.
- S4C-2. Establish career and professional development advisory roles at regional headquarters.
- S4C-3. Implement a talent management process to foster upward mobility of agency employees.

### Measures

- M4C-1. Turnover rate for full-time employees.

## Goal 5: Continuous Improvement

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**Continuously improve agency efficiencies and effectiveness and ensure that the agency has the necessary resources to carry out the mission.**

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### Goal Summary and Alignment

*Developing a system for continuous improvement will enable the agency to evaluate changing program needs, prioritize actions, assign and manage scarce agency resources, and allow for*



*effective program integration in a manner that supports the Agency's strategic goals. A trained and expert workforce will allow VDOF to actively work towards the accomplishing the three National State and Private Forestry Priorities.*

## **Objective 5A: Ensure the agency has adequate equipment, tools, facilities and resources.**

VDOF's unique mission requires the agency to maintain facilities in geographically dispersed and remote areas; to procure and maintain specialized equipment; and most importantly to support employees with the tools, resources, and communication and information systems that will enable them to effectively carry out that mission in a safe and professional manner.

### **Strategies**

- S5A-1. Establish an advisory group of knowledgeable vehicle operators and mechanics to help guide the procurement of agency vehicles.
- S5A-2. Determine acceptable levels of broadband capacity for satellite offices, survey existing broadband capacity and other connectivity issues at those offices, and prioritize upgrade work accordingly.
- S5A-3. Evaluate Integrated Forest Resource Information System (IFRIS) modules and determine funding needs for modules that require critical upgrades or replacement with commercial-off-the-shelf products where appropriate.
- S5A-4. Contact decision makers in other state and local agencies to secure long-term agreements for the construction of garages for our firefighting equipment.
- S5A-5. Develop a plan to prioritize and obtain funding the removal of all abandoned VDOF fire towers over a ten-year span.

### **Measures**

- M5A-1. Percentage of VDOF facilities with acceptable broadband capacity and connectivity.
- M5A-2. Number of IFRIS modules and IFRIS enhancement activities or technology updates.

## **Objective 5B: Practice continuous process improvement.**

Employing a standardized method for continuous improvement that incorporates input and feedback from all levels of the agency and includes routine reviews of decisions will increase agency effectiveness and employee involvement.

### **Strategies**

- S5B-1. Promote awareness and implementation of best internal control practices and procurement practices.
- S5B-2. Ensure internal communications effectively provide for input, feedback, and progress reporting.
- S5B-3. Build a knowledge base in a variety of formats to document frequently asked questions (FAQs) for technology and information systems used by the agency.
- S5B-4. Increase efficiencies in the processing of cost share transactions through the acceptance of digital signatures and the exchange of pertinent documents in electronic form.



## Measures

- M5B-1. SWaM compliance percentage.
- M5B-2. Percentage change in agency maintenance costs for pick-up trucks and SUV's.
- M5B-3. Number of educational materials that are developed and distributed through the agency's technology and information systems knowledge base.

## Objective 5C: Ensure VDOF adapts to address the changing needs of forest resources and society.

An agency protocol that enables agency leadership to evaluate potential new programs and activities that align with the agency's mission, develops strategies to incorporate them into the agency's operations based on available resources, and evaluates the success and scale of existing programs will help the agency adapt to ongoing changes.

## Strategies

- S5C-1. Develop a process to determine the desired scale and scope of all existing agency programs to effectively allocate resources.
- S5C-2. Develop a framework and implementation plans for the Conservation, Community Forestry, and Marketing programs to effectively integrate these programs within regional operations.
- S5C-3. Establish a protocol to evaluate new opportunities, determine their desired scope and scale, and prioritize or develop the necessary resources for those adopted.

## Measures

- M5C-1. Number of projects reviewed through the agency's change management process.

# Goal 6: Outreach and Collaboration

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## Broaden outreach and collaboration to increase our influence and generate support for the agency and our mission.

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### Goal Summary and Alignment

*To be relevant to our audience and best serve the forest resource, we need to communicate information supported by science that best addresses the needs of the Commonwealth. Information sharing and collaboration is key to accomplishing the three National State and Private Forestry priorities.*





## **Objective 6A: Increase agency visibility and communications with key audiences.**

To support the agency's mission and help achieve its goals, we must strengthen and expand our position as a trusted voice of forestry information and valued resource for our diverse audiences.

### **Strategies**

- S6A-1. Develop strategies (e.g., conservation education, digital marketing) to reach target audiences and sustain engagement through relevant media platforms.
- S6A-2. Develop and implement a business plan for the website redesign.

### **Measures**

- M6A-1. Number of non-digital outreach activities implemented.

## **Objective 6B: Cultivate partnerships to increase our influence and reach.**

Strong partnerships enable us to balance the economic, environmental and social benefits of Virginia's forest resources.

### **Strategies**

- S6B-1. Identify partners and corresponding agency liaisons.
- S6B-2. Develop and implement mutually supportive plans of action.

### **Measures**

- M6B-1. Number of partnerships with established agency liaisons.

# Resources Necessary to Address Statewide Strategies

Objective	State Resources in Place and Adequate	Increase in State Funding	Increased or New Local Funding	Continued Federal Funding at Current Levels	Moderate Increase in Federal Funds	Significant Increase in Federal Funds	Federal Funding for a New Initiative	Collaborative Leadership from USDA-FS or Other Federal Agency	Collaboration with Other State and Local Governments/Agencies	State Legislative Action	Federal Legislative Action
1A – Agency maintains agency readiness to respond to wildfires and other emergencies.		***			***						
1B – Protect forestland from fragmentation or conversion to non-forest		***				***	***	***	***	***	***
1C – Proactively prevent loss of forest resources to wildfire and other disasters.		***			***				***		
2A – Increase forest management planning to increase production and ensure resource sustainability on all lands.		***			***			***	***		
2B – Enhance timber harvest inspection program to help loggers protect water quality.		***			***			***	***		
2C – Expand VDOF role to support forest economy and new markets for underutilized forest products.		***	***		***			***	***		
3A – Expand healthy tree canopies to improve Virginia communities.		***			***			***	***		
3B– Enhance the capacity of forests and trees to protect water quality		***	***		***			***	***		
3C – Promote use of prescribed fire to meet management and training objectives.		***			***		***	***	***		

4A – Recruit and retain engaged and inclusive VDOF workforce		***			***						
4B – Implement training and policies to develop technical competence and safe work environments.		***	***		***				***		
4C – Establish a VDOF employee succession plan		***			***						
5A– Ensure VDOF has adequate equipment tools and resources to carry out mission.		***			***						
5B – Practice continuous process improvement throughout VDOF		***			***			***	***		
5C – Ensure VDOF adapts to address changes needs of forest resources and society		***			***			***	***	***	
6A – Increase VDOF visibility and communications with key audiences.		***			***			***	***		
6B – Cultivate partnerships to increase VDOF influence and reach		***			***			***	***		

**Table 1.** Resources Necessary to Address Statewide Strategies

# VDOF Programs Involved in the Completion of Each Objective

Objective	Wildfire Suppression, Prevention, and Public Safety	Forest Health	Forest Legacy/Land Conservation	Forest Stewardship and Management	Urban and Community Forestry	Forest Inventory and Analysis	Water Quality	Tree Nursery & Tree Improvement Program	State Forest System & State-Owned Lands Prog.	Conservation Education	Forest Products Marketing & Utilization
1A – Agency maintains agency readiness to respond to wildfires and other emergencies.	***										
1B – Protect forestland from fragmentation or conversion to non-forest		***	***		***		***		***	***	***
1C – Proactively prevent loss of forest resources to wildfire and other disasters.	***	***		***	***	***					
2A – Increase forest management planning to increase production and ensure resource sustainability on all lands.		***	***	***	***			***	***	***	***
2B – Enhance timber harvest inspection program to help loggers protect water quality.							***		***		
2C – Expand VDOF role to support forest economy and new markets for underutilized forest products.				***		***				***	***
3A – Expand healthy tree canopies to improve Virginia communities.			***		***		***		***	***	

3B– Enhance the capacity of forests and trees to protect water quality			***	***	***		***		***	***	
3C – Promote use of prescribed fire to meet management and training objectives.	***	***		***						***	
4A – Recruit and retain engaged and inclusive VDOF workforce	***	***	***	***	***	***	***	***	***	***	***
4B – Implement training and policies to develop technical competence and safe work environments.	***			***		***	***				
4C – Establish a VDOF employee succession plan	***	***	***	***	***	***	***	***	***	***	***
5A– Ensure VDOF has adequate equipment tools and resources to carry out mission.	***	***	***	***	***	***	***	***	***	***	***
5B – Practice continuous process improvement throughout VDOF	***	***	***	***	***	***	***	***	***	***	***
5C – Ensure VDOF adapts to address changes needs of forest resources and society	***	***	***	***	***	***	***	***	***	***	***
6A – Increase VDOF visibility and communications with key audiences.	***	***	***	***	***	***	***	***	***	***	***
6B – Cultivate partnerships to increase VDOF influence and reach	***	***	***	***	***	***	***	***	***	***	***

**Table 2.** VDOF programs involved in each agency objective matrix.



# Appendix A

## US Forest Service Forest Legacy Program – Virginia Program Guidelines

Updated April 2020

### Introduction

This Virginia Program Guidelines document for the Forest Legacy Program (FLP) in Virginia is part of the larger effort by VDOF to undertake a Statewide Assessment of Forest Resources. This FLP document is being incorporated into the assessment document, and is intended to state the program's Eligibility Criteria; Forest Legacy Area; requirements, and procedures. This Virginia Program Guidelines document, along with the associated Statewide Assessment of Forest Resources document, supersedes the previous version, dated June 2010.

This Virginia Program Guidelines document is intended to complement the publication entitled *Forest Legacy Program Implementation Guidelines*, US Forest Service (USFS) publication number FS-1088, dated May 2017. This grant program manual guides the FLP in Virginia.

The FLP is one of several federal programs on which VDOF partners with the USFS in implementation and is a program critical for the conservation of important forestlands within the Commonwealth.

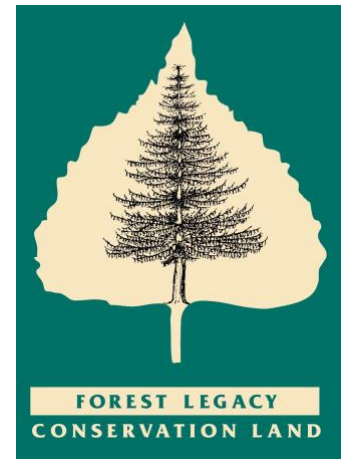
Interim FLP program changes related to the Forest Legacy Area were presented to the USFS and approved in 2017. This interim revision is incorporated into this document, in addition to minor edits, to achieve compliance with the USFS issued 2017 Forest Legacy Program Implementation Guidelines. Eligibility Criteria are unchanged from the 2010 version of this guidelines document.

These Virginia program guidelines and procedures include detailed information on: 1) the FLP advisory sub-committee; 2) program promotion; 3) the application process; 4) project prioritization; 5) grant management; 6) due diligence; 7) deed preparation; 8) closing, and 9) easement monitoring.

### Virginia's Forest Legacy Program Overview

Virginia's forests are extremely diverse and provide a multitude of economic, environmental and social benefits to Virginians. Of the Commonwealth's more than 16 million forested acres, approximately 77 percent are in private ownership. The importance of forests in cleansing air, purifying water, providing traditional forest products and fostering opportunities for recreation is unparalleled. One primary goal of the FLP in Virginia is to make available to the citizens of Virginia these "working forests" across the Commonwealth, providing the multiple benefits inherent to healthy, productive forests.

The FLP assists state governments in the identification and protection of important private forest tracts that are threatened by conversion to non-forest uses. The primary protection tool under the program, the conservation easement, is an effective means of influencing the disposition of important





forestland while continuing private ownership. The program also funds the fee-simple purchase of properties as state forests and other state-owned lands protected from development.

The FLP was initiated in Virginia in October 1999, when former Governor James S. Gilmore III designated VDOF as the state lead agency for the program. VDOF is responsible for managing the program and the associated federal grant funds for the conservation of important state forestlands. VDOF's goal is to support diverse, well-managed working forests, as these forests are healthiest and most productive and, consequently, provide the most public benefit when protected from the economic pressure for development.

## Program Eligibility Criteria

The eligibility criteria for Virginia's FLP were revised during 2007 and 2008 during an interim revision to the program's Assessment of Need document (see Appendix A-1). The current eligibility criteria for Virginia's FLP, defined at the time of these interim revisions, are:

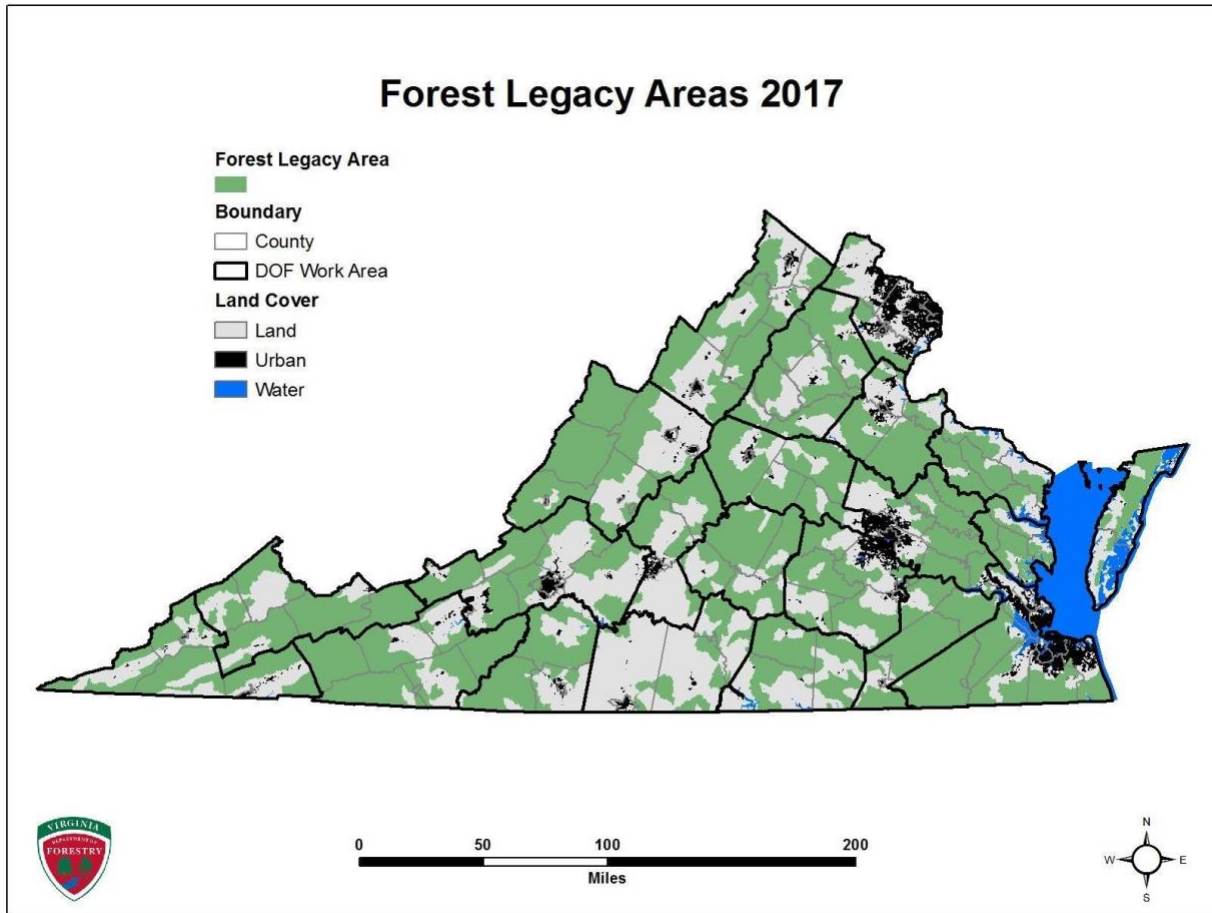
- ◆ **Threatened by conversion** to non-forest use (fragmentation and reduction in linkages);
- ◆ Continued production of **timber and other forest commodities** (local and regional economic base);
- ◆ Consideration of **natural heritage resources** (e.g., natural communities; habitat for rare, threatened and endangered species; significant geologic features), and
- ◆ **Watershed values** (e.g., water quality, wetlands, riparian buffers, groundwater recharge, public water supplies).

## Program Priority Areas (Forest Legacy Area)

The FLP must be focused to be effective with limited funding availability and to meet the demands of a competitive grant application and approval process. By identifying areas of the state that possess the highest conservation value (based on the program's Eligibility Criteria), limited grant funding can be best utilized to conserve those areas most deserving of conservation. This strategy also puts the state in a position to compete well at the national level.

Beginning in 2007, Virginia undertook a process to identify the priority areas for the state (see Appendix A-1). This process resulted in the designation of a revised Forest Legacy Area for the state in 2008, as shown in Appendix A-1, based on the revisions to the eligibility criteria, and the resulting GIS analysis at that time.

In mid-2009, it became apparent that the GIS analysis in 2008 was flawed because some of the data in one of the models used was not converted from 100x100-meter resolution to 30x30-meter resolution before the analysis was done. Once this change was made in January 2010 and the GIS analysis was repeated, additional hydrologic units ranked highly enough to be included in the Forest Legacy Area using the same parameters as in 2008. These corrections resulted in a 19 percent increase in land area for the Forest Legacy Area for a total area of 16.0 million acres, of which 11.7 million acres are forested. One additional minor adjustment to the Forest Legacy Area was approved by USFS in 2017. The Forest Legacy Area is 63 percent of the land area in Virginia. The current map for Virginia's Forest Legacy Priority Areas is shown in Figure 1.



**Figure 1.** Forest Legacy Area in Virginia

## Program Requirements

Below are the basic requirements for tracts and landowners in the Virginia FLP.

Each tract approved in the FLP must meet the following stipulations:

- ◆ The tract of land must be at least 50 acres in size;
- ◆ The tract must be at least 75 percent forested (see note regarding tree planting in landowner requirement section below) [forested land as defined by the State Forester under the authority of §58.1-3230 et seq. of the *Code of Virginia*, and published in the most current version of the “Manual of the State Land Evaluation Advisory Council”];
- ◆ The tract must be within, or partially intersect, the Forest Legacy Area;
- ◆ The title to the land must be free and clear of any liens and/or encumbrances, and
- ◆ For tracts offered for easement, existing mortgage holders must be willing to subordinate the mortgage to the easement.

Landowners participating in the FLP must:

- ◆ Be “willing sellers;”





- ◆ Be willing to participate in a perpetual easement that allows for annual monitoring, or be willing to sell their property in fee simple;
- ◆ Allow the Forest Legacy Monitoring Team access to the tract for evaluation;
- ◆ Be willing to plant trees on portions of the tract if the tract is less than 75 percent forested at the time of application;
- ◆ Be willing to sell the easement or fee simple rights at a bargain price not exceeding 75 percent of the appraised value according to federal appraisal standards (Uniform Appraisal Standards for Federal Land Acquisitions, commonly called a Yellow Book appraisal), excepting cases where eligible match funds are applied to bring total purchase price up to a maximum of 100 percent of the appraised value;
- ◆ Be willing, if necessary, to pay the due diligence costs necessary to acquire the conservation easement or land in fee simple, and to accept less than the full 75 percent allowed under the program to cover these costs [these costs are for required title work and closing fees; an environmental site examination; a timber cruise; an appraisal meeting federal standards; a multi-resource forest management plan, and occasionally a survey];
- ◆ Be willing to sign a letter of intent, prior to national competition, showing commitment and interest in placing a conservation easement restricting development rights on their land, or selling their land, to remain as forestland in perpetuity, and
- ◆ In the case of an easement, provide a multiple-resource forest management plan, for review by VDOF and the USFS prior to closing on the easement.

## Program Procedures

### Forest Legacy Sub-committee

The Forest Legacy Sub-committee (FLSC) is a sub-committee of the State Forest Stewardship Coordinating Committee (SFSCC). FLSC members are asked to serve on the FLSC in addition to their continued presence on the SFSCC. The makeup of the FLSC is intended to represent a broad range of forestry stakeholder groups including: landowner, forest industry, land trusts, and state natural resource agencies.

Both the FLSC and the SFSCC are advisory committees to the State Forester.

### Program Promotion

#### External

The public is made aware of the FLP in Virginia through printed information, one-on-one contacts, the VDOF website and various presentations made by VDOF personnel. Additionally, properties or easements acquired utilizing FLP funds are promoted by newspaper articles, media events and during other public gatherings.

VDOF has produced a brochure providing general information about Virginia's FLP. This brochure is made available to VDOF county personnel for distribution to local landowners or as pass-out materials at public presentation sessions regarding land conservation.



VDOF field personnel are encouraged to discuss the topic of land conservation, and in particular the FLP, during one-on-one contacts with landowners in their respective counties. They are instructed to direct specific interest in, or inquiries about, the FLP to the state legacy manager for VDOF.

Information about the FLP is found on the VDOF website ([www.dof.virginia.gov](http://www.dof.virginia.gov)), including:

- ◆ General FLP program information;
- ◆ Frequently asked questions about the FLP;
- ◆ The FLP informational document noted above, and
- ◆ Application information and materials.

Upon the acquisition of a property or an easement, VDOF promotes the FLP through public media, events and signage. These activities include the submission of news releases or written articles to print media, the coordination of on-site interviews or public events, and the posting of program signs on properties acquired with FLP funds. In addition, an FLP sign is presented to landowners of FLP-funded conservation easement properties, and the landowner is encouraged to post the sign in a conspicuous location. Every effort is made to make the public aware that Legacy funds were utilized to protect the property and its associated conservation values.

## Internal

The state legacy manager visits the three VDOF regions on an as-requested basis and outlines the FLP, the application procedures, and the ranking and approval process for regional and field personnel as needed. All personnel are urged to promote and provide information about the FLP to clients at the local or regional level.

## Application

### Pre-Application

Because the Forest Legacy Area does not cover the entire geographic area of the state, the FLP Request for Application document suggests that the applicant contact the state legacy manager. This enables the state legacy manager to determine, before a full application is submitted, whether or not a particular project falls within the Forest Legacy Area. This is an effort to avoid undue effort by the applicant in preparing a full application, only to find that the project is not within the Forest Legacy Area.

### Application

Program application materials are posted to the VDOF website, and an email message regarding the availability of these materials is transmitted to land conservation agencies, land trusts and individuals who have expressed interest in the program in approximately mid-March of each year. Also, these materials are sent to the Virginia United Land Trusts (VaULT) member group through that group's listserv. In addition, the application materials are available by request to those who prefer the individual electronic documents.

The application materials include:

- ◆ Request for Applications (including instructions for application submission);
- ◆ Application, and



- ◆ Landowner Inspection Consent Agreement.

In addition, the VDOF website includes links to the project scoring criteria and the Forest Legacy Area map to assist applicants in application consideration and preparation.

## Due Dates and Application Requirements

Applications are due in June/July and require:

- ◆ One original, and six copies, of an application for each ownership (tract) represented in the project;
- ◆ One original, signed Landowner Inspection Consent Agreement for each ownership represented in the project, and
- ◆ Additional items (photos, maps, legal description, etc.) found at the end of the application.

## Optional Application Methods

Applications can be written and submitted in one of three ways:

1. A conservation group (such as a land trust or conservation organization) completes the application reflecting the attributes of all the various tracts in a project, and individual tract landowners provide a letter with the application stating that they understand their land is being presented for FLP consideration;
2. A conservation group can have each individual tract owner complete and sign an application and provide the associated maps and documents; the conservation group then compiles the individual tract applications into one packet and submits the compiled application, or
3. An individual landowner can complete and submit an application for their ownership (one or more combined tracts or parcels).

## Application Receipt, Review and Acceptance

FLP applications will be accepted for tracts located wholly or partially within the boundaries of the Forest Legacy Area.

Upon receipt of an application, the state legacy manager:

1. Signs and dates the beginning of the application;
2. Signs and dates the Landowner Inspection Consent Agreement;
3. Reviews the application to make certain all essential information has been submitted;
4. Confirms that the project falls within the Forest Legacy Area, and
5. Notifies the applicant of the application acceptance or rejection.

## Evaluation and Prioritization of Projects

### Site Visits

The state legacy manager visits the site of all projects presented for the program. The visit includes meeting with the project applicant (if available) to discuss specifics of the project and to address questions the state legacy manager may have about the project or property. Additionally, the property visit includes becoming more familiar with the site and the surrounding area or other



nearby conserved properties, photographing key sites and structures at the site for presentation to the FLSC, and scoring the project.

### **Field Scoring of Projects**

During the site visit, the state legacy manager scores the project according to the scoring guidelines presented in the Project Scoring section, utilizing the Project Evaluation shown in Appendix A-6. This score sheet is used to provide a beginning score to each project for consideration by the FLSC during the state project ranking process.

### **Presentation to FLSC**

Program applicants are invited to the fall FLSC meeting in late-August to present their project to the committee. The state legacy manager assists with this presentation, when needed, by providing photographs of the site and additional helpful information gained by the site visit and prior discussions with the applicant.

### **Project Ranking by FLSC**

The FLSC considers the merits of each project, reviews the Project Evaluations for each project, considers the amount of FLP funding requested, ranks the projects based on this information and makes recommendations to the SFSCC based on these rankings.

### **Presentation to SFSCC**

The state legacy manager presents the projects to the SFSCC at their fall meeting in September/October, provides the FLSC project rankings and answers any questions that may arise. The SFSCC makes the final decision on which projects, and in what order, are recommended to the State Forester.

### **Recommendation to the State Forester**

The state legacy manager provides the recommendations of the SFSCC to the State Forester, and determines his/her decision regarding the projects that should be offered for national competition, and the rank order of the projects. Virginia usually, but not always, offers the top three ranked projects for consideration by the National Panel.

### **Initial Data Entry into Forest Legacy Information System**

The state legacy manager enters project information into the Forest Legacy Information System before the annual deadline (usually the end of November).

### **Assistance to the National Panel**

The state legacy manager makes himself/herself available during the two days of the National Panel meeting (usually in January) to provide additional information and assistance, if needed, during the ongoing panel discussions and national project ranking.

## **Grant Management**

### **Receipt of Grant Funding**

Once FLP funds are appropriated, the VDOF finance office receives the grant award letter, along with an Award Approval/Obligation/Acceptance document. The State Forester signs and returns the acceptance document to the USFS, obligating VDOF to utilize and expend the grant funds according to federal guidelines as stated in the award letter and other grant-related standards.



## Tracking of Grant Funding

The VDOF finance office tracks FLP grant funds through a series of spreadsheets. Both land grant funds and administrative grant funds are tracked by this method.

## Filing, Record Keeping, and Reporting

The VDOF finance office keeps original grant documents, with copies held by the state legacy manager. In addition, both the VDOF finance office and the state legacy manager maintain spreadsheets of administrative grant fund balances for each grant year. The state legacy manager (in consultation with the VDOF finance office) submits an annual report for land and administrative funds to the regional legacy manager (in Atlanta). In addition, the VDOF finance office submits annual grant balance reports to appropriate federal grant personnel.

## Data Entry in Forest Legacy Information System

Upon award of grant funding, the Forest Legacy Information System is updated by the state legacy manager (or his/her designee) to reflect the grant funds and to update the project status.

## Due Diligence/Program Requirements

### State Capital Project Forms

Once FLP grant funds are awarded, the state legacy manager, in consultation with the VDOF finance office, files a CO-2 form with the state Bureau of Capital Outlay Management. This form is required before VDOF can expend funds for FLP project due diligence costs or purchase costs.

### Title

Tracts funded by the FLP must have a title search, and said search must prove a title free and clear of any encumbrances or clouds on the title. Title insurance, in the dollar amount paid for the easement or fee, is required. The state legacy manager arranges for the title search and title insurance.

### Appraisal

An appraisal to Uniform Appraisal Standards for Federal Land Acquisitions (UASFLA) standards (commonly called a Yellow Book appraisal) is required. The state legacy manager contracts for this appraisal.

The appraisal guidelines found on pages 61-62 of the *Forest Legacy Program Implementation Guidelines*, dated May 2017, are followed during the hiring of an appraiser and during the appraisal process.

### Appraisal Review

The appraisal must be subjected to a technical review to determine if the appraisal meets the Yellow Book appraisal standards. This review does not consider, or comment on, the values found in the appraisal. This appraisal review can either be conducted by a federal appraisal reviewer or by an appraisal reviewer contracted by VDOF. The state legacy manager makes arrangements for this appraisal review.

The appraisal review guidelines found on pages 61-62 of the *Forest Legacy Program Implementation Guidelines*, dated May 2017, are followed during the appraisal review process.

### Timber Cruise



Since all FLP projects include properties that are forested, a timber cruise is usually necessary to provide timber value information for use by the appraiser. VDOF contracts for a cruise and provides it to the appraiser for proper incorporation into the appraisal report.

### **Environmental Assessment**

Tracts are examined during the on-site visit during the Evaluation and Prioritization of Projects phase previously described. The state legacy manager examines the site on foot, and also examines aerial photography of the site, during this property examination. In addition, the owners of tracts accepted into the program are expected to complete a short questionnaire about their knowledge of any past or present hazardous waste dumping on or near the tract.

For a conservation easement, if on-site scoping indicates a potential issue of concern, a Phase I Environmental Site Assessment (ESA) is performed as part of due diligence for the tract. For a fee acquisition, a Phase I ESA is required by state acquisition guidelines.

### **Stewardship Plan**

All Forest Legacy Program tracts (fee or easement) acquired with grants issued after May 2017 require a multiple-resource forest management plan, prior to closing. VDOF can prepare this plan in most cases, but if the plan cannot be completed by a VDOF forester due to workload or other factors, the state legacy manager assists the landowner by providing a list of consultant foresters who can prepare this plan. For easement acquisitions, the plan must be approved by VDOF prior to closing.

### **Survey**

Tracts offered for the program that are full-tax parcels (or combinations of full-tax parcels) are described in the legal description in the deed, and do not require a survey. For tracts offered that are only a portion of a tax parcel, a survey is usually required to define the land area being offered. Tracts offered as a fee simple acquisition require a survey to meet state acquisition requirements.

### **Payment of Due Diligence and Other Costs**

FLP administrative grant funds are utilized to pay the costs of the necessary due diligence and other acquisition costs. This includes the costs for: 1) title work, title insurance and closing; 2) the appraisal and appraisal review; 3) the timber cruise; 4) the Phase I ESA, if needed, and 5) the Stewardship Plan.

FLP administrative grant funds are fixed each fiscal year, so if the due diligence, surveys, and other costs for a tract exceed the administrative funds available, the landowner may be asked to pay all or a portion of these costs, or to accept a lesser amount for his/her land or easement to cover these costs. The landowner agrees to this payment arrangement at the time of application to the program.

### **Deed Language and Negotiations**

As with any real estate transaction, a deed is necessary to record the transfer of the property (or rights to the property in the case of a conservation easement). A deed for a fee acquisition under the FLP is fairly typical to a standard real estate transaction. However, with the purchase of development rights under a conservation easement, the deed language negotiation process can be more arduous and requires additional effort by both parties so both can be satisfied by the language found in the deed.

VDOF recommends that legal counsel be sought by landowners entering into a real estate transaction, and in particular, a conservation easement. The FLP does not pay for this counsel; it is a cost that must be borne by the landowner.



The FLP requires language in the deed (whether fee simple or easement) that: 1) states the purposes of the Forest Legacy program and the federal code section; 2) allows for reversion of the funds to the FLP should the land or easement be sold, exchanged or otherwise disposed of, and 3) requires that a governmental entity hold the property/easement. In addition, an easement deed must place the easement restrictions over the property in perpetuity.

## **Pre-Closing Activities**

### **Baseline Documentation Report (Conservation Easements Only)**

In the case of a conservation easement, prior to closing, the state legacy manager visits the property to ascertain the condition of the property (land, forest and structures) at the time of the easement. This visit involves both written notes and photography of the site.

The state legacy manager prepares the Baseline Documentation Report and presents two originals of the report to the landowner for review and confirmation signature immediately prior to closing. One original is kept by the landowner and the other is retained by VDOF.

### **Program Level Approval**

Prior to closing, the state legacy manager submits copies of the deed, title insurance binder, appraisal and appraisal review report to the regional legacy manager for review and approval. Additionally, for conservation easements, a copy of the Stewardship Plan, Baseline Documentation Report and match letter are provided.

### **Optional Finance Processes**

If funds are not available within VDOF for closing, the VDOF finance office files proper grant forms with the USFS grant personnel to receive an advance on the necessary funds.

## **Closing**

### **Deed**

The final deed, agreed to by both parties, is circulated for signatures and is then provided to the settlement agent (a title company or attorney) for closing.

### **Closing**

The settlement agent prepares a settlement statement and circulates it and other required documentation to both parties for signatures. The VDOF finance office wires funds to the settlement agent approximately two days before closing. The settlement agent records the deed and disburses funds to the seller.

## **Post-Closing Activities**

### **Document Filing**

Upon receipt of the original recorded deed and title insurance policy from the settlement agent, the state legacy manager files the original deed, the original Baseline Documentation Report, VDOF original settlement statement and the title insurance policy in the fireproof filing cabinet.

### **Data Entry in Forest Legacy Information System**

After closing, the closing date, final tract acreage, cost and conservation values information are entered into the Forest Legacy Information System.



## State Capital Project Forms

Once closing occurs, the state legacy manager, in consultation with the VDOF finance office, files a state CO-14 form with the state Bureau of Capital Outlay Management to report actual expenditures for the project.

## Optional Finance Processes

If an advance on grant funds prior to closing was not necessary, the VDOF finance office files proper grant forms with the USFS grant personnel to receive a reimbursement of the funds necessary for closing.

## Easement Monitoring

### Easement Tracking

Recorded FLP easements are added to the VDOF easement tracking database within its online Integrated Forest Resource Information System (IFRIS) data management system, denoted as being funded by the FLP. A unique easement number is assigned to the easement.

### Monitoring Schedule and Field Monitoring Visits

FLP easements are monitored annually. Upon closing, the state legacy manager records the easement in a monitoring record file which is used to prompt the state legacy manager, or appropriate VDOF field personnel, when the annual monitoring visit should be scheduled.

Prior to the monitoring visit, every attempt is made to contact the landowner and to encourage his/her presence during the visit.

### Monitoring Reports and Filing

Monitoring reports are completed during the visit. Upon return to the office, the report is completed electronically and reviewed/certified within the online IFRIS system.

## Program Parameter Revisions

### Eligibility Criteria Revisions

The FLSC may recommend amending the eligibility criteria on a periodic basis to ensure they are kept current with statewide resource priorities and needs.

Revisions to the eligibility criteria should, at the same time, include a re-consideration of the models and weights used in GIS modeling for the Forest Legacy Area and a revision to the Forest Legacy Area.

As a minimum, the eligibility criteria are re-considered by the FLSC during the process of revising the overarching Statewide Assessment of Forest Resources.

### Forest Legacy Area Revisions

The FLSC may recommend amending the Forest Legacy Area periodically to:

1. Fully encompass approved tracts whose geographic boundaries only partially intersect the current Forest Legacy Area (a minor revision).
2. Update the Forest Legacy Area (a major revision):
  - a. Due to changes to program eligibility criteria;
  - b. To take advantage of new GIS models that may become available;





- c. To keep current with a changing resource base or other parameters that may affect the designation of priority conservation areas, and
- d. To incorporate updates to conservation partner group focus areas.

As a minimum, the Forest Legacy Area should be reconsidered by the FLSC during the process of revising the overarching Statewide Assessment of Forest Resources.

### **Minor Forest Legacy Area Revisions to Incorporate Entire Tracts**

Tracts (within a project) that are submitted for consideration under the program are individually compared to the current Forest Legacy Area. Tracts that partially intersect the Forest Legacy Area are considered “in,” and are eligible for participation in the FLP. In this case, a minor revision to the Forest Legacy Area is made to incorporate the entire tract. Such a revision was requested by VDOF and then approved by the USFS in 2017.

### **Submission of GIS Files**

In the case of either a minor or major Forest Legacy Area revision, revised shape files are submitted by the state legacy manager to USFS GIS personnel.

## **Appendix A-1: Assessment of Need Interim Revisions Process**

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Beginning in January 2007, Virginia embarked on an extensive process to amend the Assessment of Need (AON) for the Forest Legacy Program in the Commonwealth. This process involved revision of the program Eligibility Criteria and Forest Legacy Areas (FLA), and well as some procedural changes.

The following sections provide a brief overview of the process undertaken by the Forest Legacy Subcommittee (FLSC); the State Forest Stewardship Coordinating Committee (SFSCC); the State Forester, and the forest legacy manager to develop the interim changes to the AON approved in 2008. Since 2008, the only change to the AON is a minor revision approved in 2017.

### **Revised Eligibility Criteria**

Changes to the eligibility criteria for Virginia’s program were considered by the FLSC during its January 2007 meeting, confirmed by the SFSCC at its March 2007 meeting, approved by the State Forester in March 2007, and approved by the USFS in July 2008. Further details about public input regarding these revisions are found below.

This process resulted in the current eligibility criteria for Virginia’s program stated in the Purpose of Virginia’s Forest Legacy Program section above.

### **Revised Forest Legacy Areas**

Based on the recommendation of the two committees (FLSC, SFSCC), and the approval of the State Forester, the revised eligibility criteria were subjected to GIS analysis using various models and tools (see GIS Data Layers) during July and August 2007 to derive draft FLA for Virginia. The GIS analysis, as directed by the committees, weighted the four criteria equally, and ranked the land area of the entire state according to conservation values from 1 to 12 (see Table 2). Using a hydrologic unit as the defining geographic unit, a draft FLA map showing hydrologic units that had a conservation value ranking of six or greater was offered for public comment.



## Public Input

The proposed revisions to the Eligibility Criteria and FLA were distributed for widespread review by land conservation professionals via email, and to the public via the agency website, beginning in October 2007. The input received by email, letter and in person at a January 2008 public input session, was considered by the FLSC and the SFSCC in determining the next steps to take in revisions to the Eligibility Criteria and FLA.

## Call for Target Areas

Based on the information received, the importance of the inclusion of target areas of land conservation stakeholders across the state became apparent. In January 2008, the FLSC recommended to the State Forester that the land conservation community be given the opportunity to submit GIS data and shape files of their target areas for possible inclusion in the new FLA. The deadline for submission was late February 2008. Submissions from 10 groups were received.

## Change in FLA Determination

At the time that the call for target areas was made, the FLSC also recommended that consideration be given to the idea that:

1. All areas of the state that possess a high conservation value in the GIS analysis should automatically be **included** in the FLA;
2. Target areas that fall within areas of the state where conservation values ranked in a mid-range should also be **included** in the FLA, and
3. Target areas that fall within areas of the state that have low conservation value in the GIS modeling should be **excluded** from the FLA.

## Target Areas Submitted

Target area submissions were received from the following land conservation stakeholders:

- ◆ Virginia Department of Conservation and Recreation
- ◆ Virginia Department of Game and Inland Fisheries
- ◆ Northern Virginia Conservation Trust
- ◆ New River Land Trust
- ◆ Potomac Conservancy
- ◆ Piedmont Environmental Council
- ◆ Shenandoah Valley Battlefield Foundation
- ◆ The Nature Conservancy
- ◆ Valley Conservation Council
- ◆ West Piedmont Planning District Commission

The target areas received showed significant overlap between the areas submitted by the various groups, and the draft FLA presented for public review.



## Finalizing the FLA

Following the submission of target areas, GIS maps were provided to the FLSC for consideration. These maps included both the hydrologic units that ranked highly and would automatically be included in the FLA, and the target areas that were submitted.

In April 2008, after consideration of the new maps, the FLSC recommended to the State Forester that the revised FLA should include areas with a conservation value ranking of seven or greater, and the targeted lands that fall within areas ranked from five to seven.

The resulting FLA map (shown in Figure 1) included 13.8 million total acres – 55 percent of the total land area in the state – and 9.9 million acres of forestland, which is 63 percent of the total commercial forestland statewide.

## GIS Data Layers

### Purpose

Identify areas where forests meeting the conservation values identified in the Eligibility Criteria should be conserved.

### Data Layers

1. **Streams, shorelines and floodplain forests** – created Euclidean distance model for National Hydrography Dataset data and overlaid stream buffers up to 500 meters with forested wetlands.
2. **Forests in headwaters and steep slopes** – ran Euclidean distance model on watershed boundary dataset (used boundary lines between watersheds) and overlaid with slopes  $\geq$  25 percent.
3. **Forest protecting drinking water supplies** – used surface water protection areas provided by Department of Health.
4. **Large, continuous blocks of forest** – used Virginia Natural Landscape Assessment (VANLA) data and extracted forests with at least 100 acres of interior conditions.
5. **Sustainable, managed working forests** – used forest economic model developed by VDOF – based on woodland soil productivity, forest types and economic value of timber.
6. **Index of terrestrial integrity** – based on National Land Cover Dataset 2001 data; area of natural cover, river-stream corridor, area of roads and imperviousness:
  - a. Index of terrestrial integrity =  $(0.75 * \text{Nat Cov}) + (0.25 * \text{River/Stream}) - (0.25 * \text{Road area}) - (0.25 * \text{Imperviousness})$ .
7. **Index of aquatic integrity** – Greg Garman of the Center for Environmental Studies and Department of Biology, Virginia Commonwealth University provided Modified Index of Biotic Integrity (*mIBI*) for the sixth order hydrologic units of the Virginia Chesapeake Bay watershed.

The *mIBI* is computed from six metrics that are used to determine watershed biotic integrity across broad spatial scales:

- ◆ Number of intolerant species;

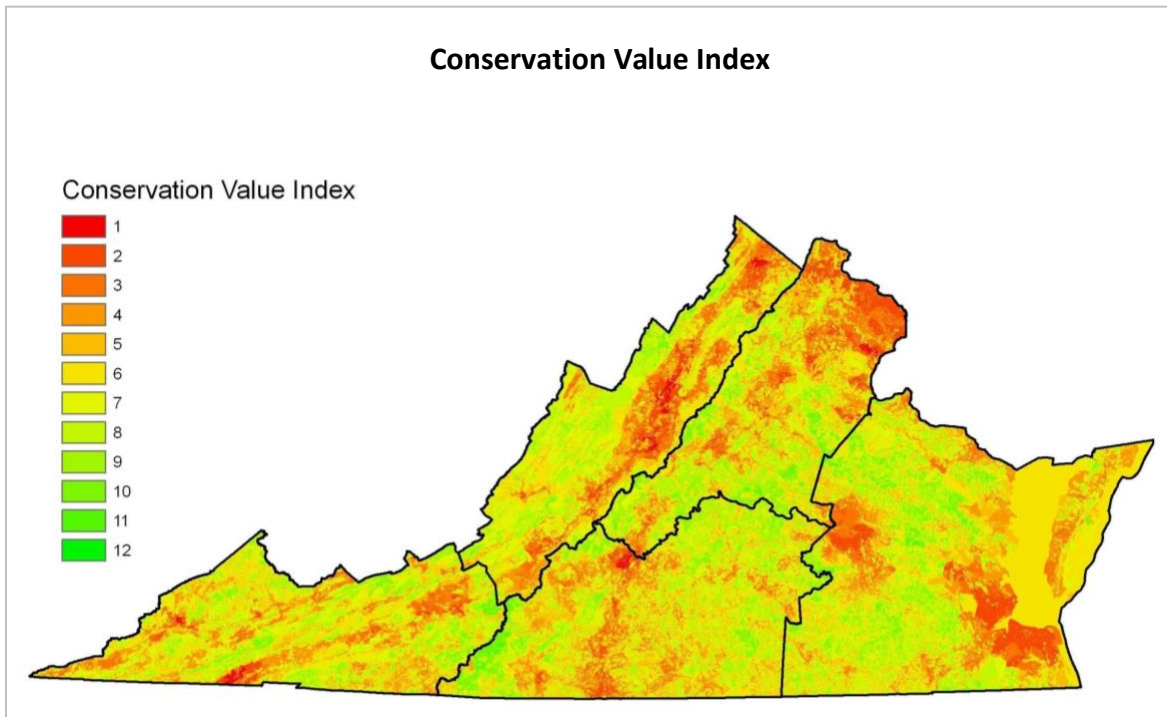


- ◆ Native species richness;
- ◆ Number of RTE species;
- ◆ Number of non-indigenous species;
- ◆ Number of Critical/Significant species, and
- ◆ Number of Tolerant Species.

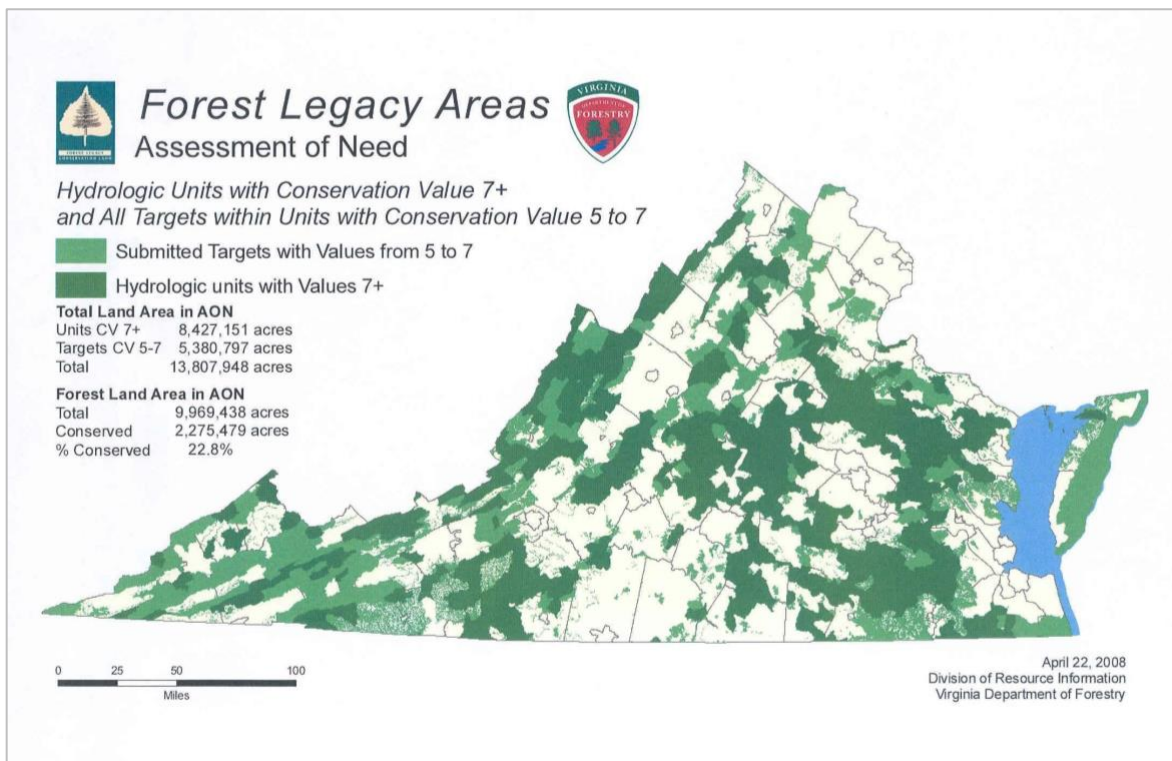
8. **Threat of Forest Conversion** – based on Theobald’s housing density model.

Virginia Forest Legacy Eligibility Criteria					
GIS Data Layer	(1) Threatened By Conversion	(2) Timber & Other Forest Commodities	(3) Natural Heritage Resources	(4) Watershed Values	(5) Percent Weight in Model
Streams, shorelines & floodplain forests			2	2	4
Forests in headwaters & steep slopes				3	3
Forest protecting drinking water supplies				4	4
Large continuous blocks of forests		6	5	4	15
Sustainable, managed working forests		4	2		6
Terrestrial Integrity		15	4	4	23
Aquatic Integrity			12	8	20
Threat of forest conversion	25				25
	<b>25</b>	<b>25</b>	<b>25</b>	<b>25</b>	<b>100</b>

**Table 3.** Virginia Forest Legacy Eligibility Criteria



**Figure 2.** Conservation Value Index (Ranking: 1 (lowest) to 12 (highest))



**Figure 3.** Forest Legacy Areas (July 2008)



## Appendix B

### Virginia Forest Stewardship Operating Plan



#### ***STEWARDSHIP***

***The wise application of environmental and economic resource management principles to maintain and enhance the multiple benefits of the forest for current and future landowners and the public.***

This Operating Plan was developed by VDOF in cooperation with the Virginia Forest Stewardship Coordinating Committee (FSCC) to guide forestry professionals in the implementation of the Forest Stewardship Program.

Updated 3/2020



## Program Purpose

The National Association of State Foresters, in cooperation with the USFS State and Private Forestry Program, developed an initiative called the **Forest Stewardship Program** in 1990. The purpose of this state-based program is to improve the management of Private Non-Industrial Forest lands (PNIF) for multiple resource benefits, including wildlife, water, recreation, and forest products.

Better coordination and cooperation among resource management specialists from various state and federal agencies and the private sector should result in more efficient and effective technical assistance to private forest landowners. Comprehensive multiple-use forest resource management plans may be prepared jointly by the cooperating agencies, consulting foresters or forest industry landowner assistance foresters who will incorporate the landowner's objectives with sound forest management and conservation practices.

Forest stewards are custodians of Virginia's bountiful forest resources. Their thoughtful management of the forests in their care helps provide many benefits to them, society and the world as a whole. The right to own land is among the most treasured and most valued rights of all American citizens. The ownership of land not only grants landowners the privilege of pursuing personal goals, but also carries the responsibility of good stewardship.

The increased demand for forest amenities, combined with a shrinking land base accentuates the need for all forest landowners to actively manage their forested properties. A number of opportunities exist for improved resource management.

PNIF landowners, who hold nearly 11 million acres of forestland in Virginia, present the greatest opportunity for making improvements to the supply and condition of the state's forest resources. Most of these forestlands are unmanaged. With good stewardship management, these forestlands could better provide Virginia's needs for clean water and air, healthy thriving populations of fish and wildlife, quality outdoor recreation experiences, essential forest products, and the protection of important archaeological and other historic resources. Good stewardship contributes to natural beauty, guards against soil erosion and depletion of soil productivity and protects wetlands. Good stewardship also protects forests from insects, diseases, wildfire, overgrazing and poor resource management. Making sound, long-term economic decisions is also part of good stewardship.

The Virginia Forest Stewardship Program is designed to educate and guide forest landowners in the complex and rewarding field of resource management by providing coordinated assistance from the many varied professionals with an interest in multiple-use management. Participating natural resource professionals make a deliberate effort to contact forest landowners to assess their personal objectives and generate interest in stewardship management. Landowners targeted for contact are prioritized as follows:

1. Those that have performed little or no management of their forestlands.
2. Those who have managed exclusively for one resource and wish to diversify their activities.
3. Those who presently manage their properties according to the stewardship concept and deserve recognition for their efforts.

## Forest Stewardship Coordinating Committee

The **Virginia Forest Stewardship Coordinating Committee** shall provide direction for the Virginia Forest Stewardship Program administered by VDOF. The committee will meet biennially to address stewardship planning and implementation concerns and overall program coordination. Normally, committee members serve three-year terms and may be reappointed for consecutive terms. Terms



for persons who by virtue of their positions are committee members (e.g., state conservationists, agency directors, officers of organizations, etc.) would be ongoing during their tenure in the position.

The committee’s primary responsibility is to provide technical, procedural and logistical guidance to the State Forester who is responsible for the administration of the Forest Stewardship Program. Therefore, the committee will:

- ◆ To provide advice and recommendations to the State Forester concerning implementation of the Forest Stewardship Program and other associated landowner assistance and cost-share programs;
- ◆ To provide assistance and recommendations concerning the development, implementation and updating of the State Forest Action Plan;
- ◆ To provide assistance and recommendations concerning priority issues and geographies for focused program delivery and to encourage Landscape Stewardship; and
- ◆ To provide advice and recommendations concerning the Forest Legacy Program.

Individuals from each of the following agencies or groups are invited to serve on the Virginia Forest Stewardship Coordinating Committee:

Agency / Organization	
Virginia Department of Forestry (VDOP)	George Washington Jefferson National Forest
VA Board of Forestry	Virginia Forestry Association
VA Department of Game and Inland Fisheries (DGIF)	USDA Natural Resources Conservation Service (NRCS)
VA Department of Conservation and Recreation (DCR)	USDA Consolidated Farm Service Agency (FSA)
VA Association of Soil & Water Conservation Districts	Virginia Tech Cooperative Extension Service
VA Department of Environmental Quality	Virginia State University
VA Department of Historic Resources	Forest Industry
VA Division of Natural Heritage	Environmental Organizations
VA Division of Soil and Water Conservation	Forest Landowners
Consulting Foresters	Conservation Organizations
Land Trust Organizations	Local Government

## Program Implementation

### State Level

A state forest stewardship coordinator will administer and coordinate the Virginia Forest Stewardship Program. The state coordinating committee and coordinator may be assisted as needed by appointed subcommittees. These subcommittees should be comprised of representatives from the committee with a key interest in forest stewardship, such as other state and federal agencies, trade or professional associations, consulting foresters, industry foresters and environmental and conservation organizations.





## Administrative Objectives

- ◆ Update program policies, procedures and standards contained in the State Forest Stewardship Operating Plan as necessary.
- ◆ Develop strategies that can enhance the success of the program.
- ◆ Assist in meeting statewide program goals and objectives and to monitor accomplishment of those goals.
- ◆ Provide input to the VDOF from a wide variety of natural resource-related interests.
- ◆ Incorporate private natural resource concerns in program implementation.
- ◆ Coordinate program activities that will complement those of existing programs, such as Tree Farm, Partners for Fish and Wildlife, Landowner Incentives Programs and Farm Bill Programs.
- ◆ Generate widespread support for the program from forest landowners, concerned groups and the general public.

## Regional Level

For purposes of implementing the Virginia Forest Stewardship Program, the state will be divided into three regions corresponding to VDOF's administrative regions. In each region, the VDOF deputy regional forester will serve as the regional stewardship coordinator for activities in their respective regions.

These regional stewardship coordinators, working with the state coordinator, will be responsible for implementing the state program in their region. They will be responsible for coordinating publicity and participation of field personnel in Stewardship Plan preparation, implementation and property inspections. They will review Stewardship Plans, review nominations for Forest Steward Certification, inspect and, if deemed appropriate, approve properties for certification, publicize the Stewardship Program, and conduct activities which arise that will promote the program.

## Publicity

On the regional level, the regional stewardship coordinators will direct publicity they deem appropriate through radio, television, newspapers and other printed media, speaking engagements, and mailings.

## Program Outreach

Virginia is beginning to focus outreach efforts in important forest resource areas that are defined in the statewide assessment and resource strategy. Within these areas, the Forest Stewardship Program should be accessible to all landowners. In addition, outreach efforts will:

- ◆ Identify and address underserved communities and groups.
- ◆ Balance the needs of current participants and potential future participants.
- ◆ Coordinate with other landowner assistance programs to avoid duplication and support ongoing efforts as appropriate.
- ◆ Identify opportunities for landscape-scale and/or multiple landowner planning and technical assistance delivery, especially where ownerships are relatively small.



- ◆ Promote and foster the development of peer-to-peer landowner networks.

### Outreach for Traditionally Underserved Landowners

VDOF recognizes that there are traditionally underserved groups of landowners that may need specific outreach methods. Each year, VDOF cooperates and provides funding to Virginia Tech Cooperative Extension for landowner outreach. A portion of these funds are specifically set aside for outreach to these groups. Specific examples of use of these funds have been minority landowner tours and mini-grants for specific projects. VDOF and Virginia Tech Cooperative Extension work with Virginia State University (1890 School<sup>1</sup>) in these efforts. Specific efforts are being made each year to recruit minority students to the annual VDOF Camp Woods and Wildlife held at Holiday Lake 4-H Center.

The Forest Stewardship Program and associated outreach efforts must adhere to the USDA non-discrimination policy: The USDA prohibits discrimination in all its programs and activities on the basis of race, color, national origin, sex, religion, age, disability, political beliefs, sexual orientation, or marital or family status.

### Training

VDOF offers continued program orientation and education for new personnel and participating consultant foresters. The state program coordinator will develop more structured statewide training courses for new VDOF foresters while the regional coordinators provide periodic training for consulting foresters and new VDOF foresters.

### Priority Areas

VDOF has professional field staff located throughout the Commonwealth. Additionally, as a tax-supported public service agency, VDOF is tasked to provide services to landowners throughout the state in all areas of the state. VDOF has done so, and will continue to do so, based upon requests. There is an increasing emphasis on delivering forest management assistance through many forms of plans and implementing forest management practices. Plans are a way to engage landowners to take action to achieve their objectives and positive resource outcomes. Recognizing this, and with guidance from the USFS, VDOF has selected a priority area in which to focus and invest the federal funds from the Forest Stewardship Program. The priority area is represented in Figure 4.

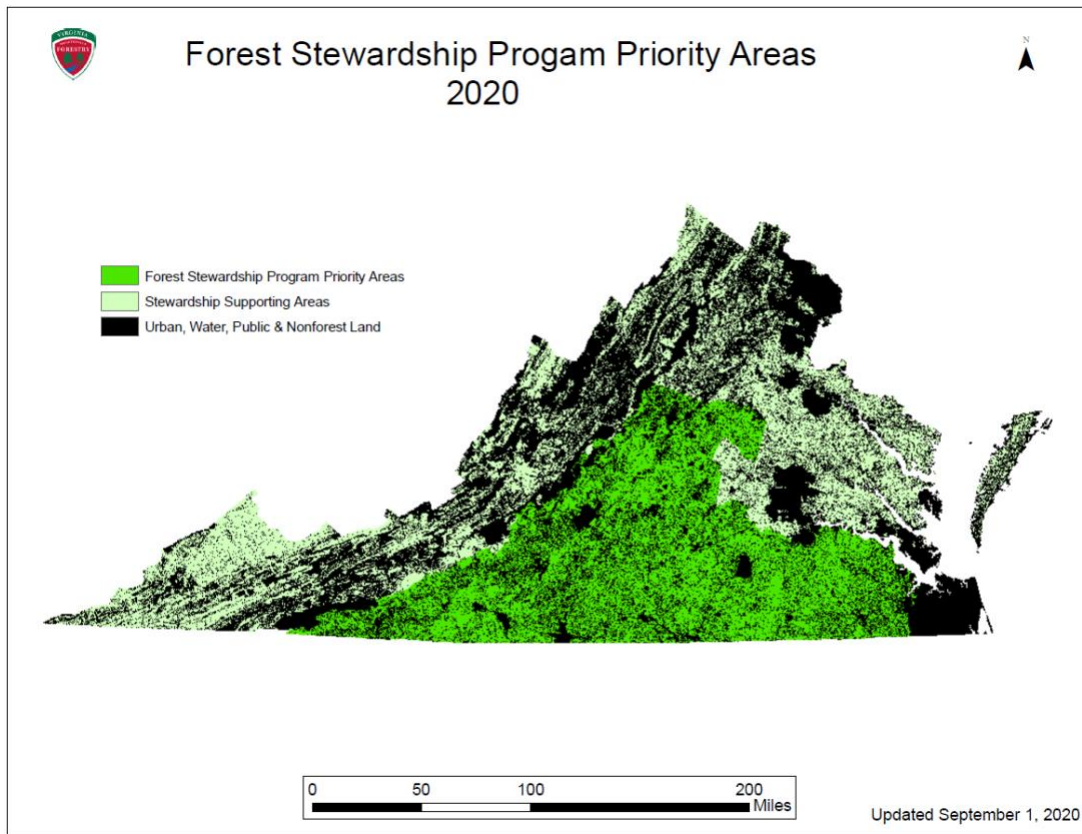
USFS provided parameters to Virginia and other states in selection of the priority area. The area was to be geographically based, not exceed 50 percent of the total eligible forestland and address critical issues like protecting water resources, enhancing wildlife habitat, and supporting jobs and the economy. VDOF analyzed data and selected the priority area because of a high concentration of active forest management, demonstrated by high levels of practice implementation. Also, wood using facilities and resulting jobs are abundant in the area. The area includes watersheds of important streams and rivers of emphasis including the Middle James, New, Roanoke and Chowan. It also included areas of other agency emphasis including the extensive southern pine basket, the highly productive hardwood forests of the Blue Ridge Mountains, and the heart of white pine production. Additionally, it encompasses focus areas for longleaf pine, shortleaf pine, American chestnut and Atlantic white-cedar restoration. It also contains regions that will benefit from focused attention to non-native invasive species, southern pine bark beetle and riparian forest buffer establishment.

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<sup>1</sup> VSU is an 1890 Institution – a historically black university and one of only 19 institutions designated with land-grant status under the Second Morrill Act of 1890.



Again, the priority area will allow a focus of Forest Stewardship federal funds on those areas. Landowner assistance and meeting resource needs is equally important in all areas of the Commonwealth, and thus are referred to as Stewardship Supporting Counties.



**Figure 4.** Virginia Stewardship Priority and Stewardship Supporting Areas

## Landscape Stewardship Plans

A Landscape Forest Stewardship Management Plan is a multi-landowner Forest Stewardship Plan written to address landscape-level issues across all ownerships. As with individual Forest Stewardship Management Plans (FSMPS), the Landscape Forest Stewardship Plan preparer(s) should consider, describe, and evaluate resource elements present and consider their importance to the landscape conservation priorities and issues. Landscape Forest Stewardship Management Plans should address:

- ◆ Priority conservation issues relevant to the landscape as discussed in the state’s Forest Action Plan.
- ◆ Opportunities for collaboration across all land ownerships, including National Forest System lands, other federal land agencies, state, municipal or non-government organizations.
- ◆ Opportunities for connecting existing and future individual Forest Stewardship Management Plans within the landscape to the issues, recommendations, and approaches described in the Landscape Forest Stewardship Management Plan.
- ◆ Desired outcomes for the conservation issues of concern in the landscape.
- ◆ Opportunities to leverage other federal, state, local and private conservation programs.



## Landowner Outreach and Education

States and territories are encouraged to focus outreach efforts in important forest resource areas and priorities defined in the state's Forest Action Plan. Within these areas the Forest Stewardship Program should be accessible to all landowners and community stakeholders as appropriate. In addition, outreach efforts should:

- ◆ Identify and address underserved communities and groups;
- ◆ Balance the needs of current participants and potential future participants;
- ◆ Coordinate with other landowner assistance programs to avoid duplication and support ongoing efforts as appropriate;
- ◆ Identify opportunities for landscape-scale and/or multiple landowner planning and technical assistance delivery, especially where ownerships are relatively small;
- ◆ Promote and foster the development of peer-to-peer landowner networks;
- ◆ Consider collaboration with other non-federal lands within the important forest resource areas, and
- ◆ Develop appropriate landowner outreach and social marketing strategies for different/diverse landowner groups and local resource management concerns, including: the use of demographic data to segment landowners according to interest and responsiveness, tailoring messages and the right service deliverer to these different segments, identifying and focusing on priority landscapes over multiple years and employing multiple interactions with landowners; and continuous evaluation of effectiveness in order to improve success over time.

## Delivery System to NIPF Landowners

Implementation of the Virginia Forest Stewardship Program will primarily be the responsibility of VDOF.

Although several agencies and resource management specialists from the private sector will be cooperating to provide multiple-use management services, VDOF will coordinate these activities so that the landowners will have a single point of contact. This will help the individual NIPF landowners implement their plan more efficiently and effectively

Currently, Virginia has an outstanding record of accomplishment in multiple-use forestry practiced by private landowners. The Forest Stewardship Program will focus on three major opportunity areas in Virginia where the greatest need exists for providing enhanced management assistance to private landowners.

1. Develop programs and activities to reach new landowners and absentee landowners who are not currently practicing multiple-use forestry or do not have a Forest Management Plan. Landowners who already have a Forest Management Plan will be encouraged to upgrade their plan to include consideration and activities for comprehensive multiple-use management in accordance with Forest Stewardship Program guidelines.
2. Provide funding for special projects and programs identified to inform landowners of services available for technical assistance from both government agencies and the private sector.



3. Better coordinate management assistance activities and cooperation among the various agencies, organizations and interest groups which provide management programs to landowners. The Stewardship Committee will continually strive to avoid duplication or competition with established programs, while providing a cooperative/coordinating role to increase overall program effectiveness.

The VDOF area foresters and technicians located in almost all counties of the Commonwealth will be the principal coordinators with PNIF landowners to promote and implement this program. They will provide this "on-the-ground" technical assistance and expertise in cooperation with other natural resource agency professionals and natural resource management professionals from the private sector to develop a Forest Stewardship Management Plan for individual forest landowners. Action programs on a state level will be developed by the state stewardship coordinator to accomplish stewardship goals. The combination of state level and local action programs will provide the successful implementation of stewardship management on private forestlands in Virginia and enhance the forest and related resources for all citizens of the Commonwealth.

## Plan Preparation Procedures

### Eligibility

NIPF landowners who own a minimum of 10 acres of forestland, and have a desire to manage their ownerships according to the program standards may participate in the Forest Stewardship Program. Forestland is defined as land at least 10 percent stocked by trees of any size or formerly having had such tree cover and not currently built-up or developed for agricultural use. Landowners who are interested in the Forest Stewardship Program must enroll their entire contiguous property into the program.

### Program Enrollment

Landowners who are interested in the program should contact their local VDOF area forester, a participating consultant forester or the local representative from one of the other participating agencies to learn more about the program. It is the responsibility of the agency representative and/or consultant to carefully explain to each landowner the benefits of the program and the procedures involved in the development of their Forest Stewardship Management Plan.

The natural resource professional who made first contact with the landowner should ensure that a follow-up letter highlighting the benefits of the program is sent to the landowner, if necessary. A copy of the Forest Stewardship Program brochure and an application should be included with the letter.

Landowners should also understand that the purpose of the program is to encourage active forestland management. This includes: measures to increase timber growth, but not necessarily the harvest of timber; improvement of wildlife habitat, but not necessarily for hunting, and opportunities for recreational pursuits, but not necessarily public access for recreation.

To enroll in the Forest Stewardship Program, the landowner will be asked to complete and sign a Form 7.10 Forest Stewardship Program Application that indicates their good faith intentions to manage their natural resources in accordance with good stewardship principles. The application will include a statement with a checkbox that the landowner must complete agreeing to pay VDOF a plan development charge if they select a VDOF forester to prepare their plan. The next step is for landowners to send the application and a map of the property to their local VDOF area forester or to the state stewardship coordinator in Charlottesville.



## Professional Qualifications to Prepare Forest Stewardship Management Plans

A Forest Stewardship Management Plan can be prepared by any VDOF forester. Consulting foresters, forest industry landowner assistance foresters and foresters who have completed the Virginia Forest Stewardship Program Training Orientation, at a statewide meeting or individually with a regional stewardship coordinator, can also prepare a Forest Stewardship Management Plan.

VDOF regional stewardship coordinator will review all Forest Stewardship Management Plans to ensure the plan includes all the information specified in the Virginia Forest Stewardship Operating Plan.

In order to use the title of forester in connection with any practice of forestry, a person shall hold a baccalaureate or higher degree from a college or university curriculum accredited by the Society of American Foresters, and such degree curriculum shall meet the minimum education criterion set forth by the society in the fields of forest ecology and biology, management of forest resources, and forest resources policy and administration (*Code of Virginia 10.1-1181.9*).

## Involvement of Consultant Foresters

Landowners who wish to have a state-approved consultant forester write their plan must identify the consultant on the stewardship application form and the application must be approved by the state stewardship coordinator prior to any field work being started. When the plan is complete, it must be submitted to the regional stewardship coordinator for review and recording.

VDOF foresters should provide landowners with the approved stewardship consultant list to select a consultant. Landowners will be encouraged to use consultant foresters to prepare their plans, unless:

- ◆ No consultants are available within the landowner's immediate area to prepare their plan.
- ◆ The landowner does not want to use the services of a private natural resource consultant. (If this is the case, the landowner will be required to pay VDOF the established per acre charge.)

## Qualifications for Other Natural Resource Specialists

If the landowner has chosen as either primary or secondary objectives in the areas of wildlife, environmental and recreation, or soil and water, then the Forest Stewardship Management Plan recommendations can be made by any resource management specialists who are determined by the regional stewardship coordinator to be qualified to provide assistance based on needs and resources of the private landowner. The various agencies and organizations represented on the Virginia Forest Stewardship Coordinating Committee may be called upon by the regional stewardship coordinator for advice should there be a question on the recommendations made by the specialist.

In the case where, in the preparation of a Forest Stewardship Management Plan, the forester and wildlife biologist or other resource specialist make conflicting or incompatible resource management recommendations, a compromise recommendation should be reached with the landowner's primary objectives as the guiding factor in the recommendation. If an acceptable compromise cannot be reached then the recommendation decision will be arbitrated by the VDOF regional stewardship coordinator.

## Plan Preparation Format and Plan Elements



A Forest Stewardship Management Plan serves as the foundation for engaging forest landowners in a plan that addresses individual landowner objectives while adhering to national and state Forest Stewardship Management Plan guidelines. It is a multiple-use document which contains integrated strategies for managing each of the major resource components on the landowner's property over a ten-year period. Resource specialists from the administering agency and the private sector contribute to the plan. All forested property is included.

The landowner shall rank their first three objectives for the property as a whole, while providing for each of the other objectives in a compatible manner. The plan will be based upon the landowner's stated objectives, field examinations, observations and other data. With the landowner's objectives known, the professional forester can refer to the appropriate minimum standards and basic guidelines when developing the plan. The following components constitute the minimum information that should be included in all plans.

**1. COVER PAGE** (see sample in appendix)

The cover page shall include bold terminology identifying the plan as a Forest Stewardship Plan. It shall also include the landowner's name, address, telephone number, the county where the property is located, and the name, address and phone number of the professional forester who prepared the plan.

**2. INTRODUCTION LETTER** (see sample in appendix)

This letter will briefly explain the importance of good forest management, management planning and how their Forest Stewardship plan is organized. This letter should also congratulate the landowner for entering into the Forest Stewardship Program.

**3. TABLE OF CONTENTS**

This table will provide a quick reference to the specific sections of the management plan.

**4. LANDOWNERS OBJECTIVES**

The landowner's primary management objectives for the property, along with the other resource concerns are identified in several paragraphs or in a list format. These goals and objectives should be identified on the stewardship application and through personal conversations with the landowner.

**5. LOCATION AND ACCESSIBILITY**

This includes the landowner's name, total property acreage, the county where the property is located, and reference to the closest town and major highways. Accessibility may include public road access to the property as well the condition of access in the forested areas of the property itself.

**6. GENERAL PROPERTY DESCRIPTION**

Describe the boundaries and how well they are marked and briefly describe the current forest conditions and the desired future forest conditions. This may include such things as a general description of the timber conditions, wildlife habitat present, existing recreational facilities, invasive species info, etc.

**7. SUMMARY OF FOREST MANAGEMENT NEEDS AND OPPORTUNITIES**

This section should contain a few short paragraphs which briefly describe the desired future condition and what practices should be performed to achieve the landowner's goals. This section should not duplicate detailed information contained in the stand recommendations. Examples are as follows:



**Timber/Forest Production** – Identify a target cutting schedule and opportunities for reforestation, improving timber growth and harvest, considering the overall objectives.

**Fish and Wildlife** – Identify featured species, presence of listed species according to the screening procedure, desirable habitat types present and opportunities for improving desirable habitat, considering the overall objectives. Reference to any threatened and endangered species lists for the particular county that is included in the appendix.

**Biological Diversity** – Describe the variability of different forest ecosystems within the property, and the interactions between the plants and animal within the ecosystems.

**Threatened or Endangered Plant or Animal Species** – Identify threatened and endangered species observed on the property or any species that are known to occur in the general vicinity of the property as identified by the Virginia Department of Game and Inland Fisheries threatened and endangered species lists.

**Natural Heritage Resources** – Identify any existing features and methods to protect those features.

**Soil and Water Conservation** – Identify areas that have existing erosion problems and areas requiring special consideration and monitoring (e.g., highly-erodible areas, wetlands, water features, riparian zones, sinkholes, etc.) and note applicable best management practice (BMP) considerations and provide supplemental BMP information in the appendix if needed.

**Wetlands** – Identify lands sometimes or always covered by shallow water or that have saturated soils where plants adapted for life in wet conditions usually grow.

**Agroforestry** – (if applicable) Identify the opportunities available to produce multiple crops from the same land base, which could include: agriculture, timber, livestock, and/or specialty crops.

**Recreation** – Identify existing recreational facilities, present and potential uses and general strategies for enhancing the landowner's desired uses.

**Aesthetic Quality** – Identify areas that are unique from a scenic, vegetative, geological or historical standpoint. Also, should include strategies and goals for enhancing these amenities.

**Cultural and Historic Resources** – If artifacts are found or the landowner has knowledge of archaeological sites on their property and wishes to record them or are interested in determining whether known sites exist on their property, they should be provided contact information for one of the four regional preservation offices for the Virginia Department of Historic Resources.

**Forest Health and Invasive Plant Species** – Identify areas where invasive plant species have been found and the importance of monitoring and/or controlling them.

**Carbon Sequestration and Climate Resilience** – Describe the long-term storage of carbon in plants and soils and the possibilities of increasing the rate of carbon sequestration through changes in land use and forestry.

**Legacy Planning** – Provide information about conservation-based estate planning and how the property can be passed down to heirs and still remain in forest.

**Forests of Recognized Importance** – Acknowledge forests of outstanding and critical importance due to their environmental, social, biodiversity or landscape values.

**Fire** – Identify potential benefits that can be achieved with controlled fire and any steps that can be taken to avoid potential wildfire damages to the property.





**8. EXPLANATION OF SIZE CLASS AND FOREST TYPES**

Provide a brief description of site index and forest types and how this information is used in the plan.

**9. TOPOGRAPHY AND SOILS DESCRIPTION**

Provide a brief description of the primary soil types, slopes and aspects on the property. Include soil descriptions and potential forest productivity. Identify any potential equipment limitations and/or erosion problems that may limit management opportunities. Include a soils map if necessary.

**10. STAND MANAGEMENT DESCRIPTIONS AND RECOMMENDATIONS**

Stand management recommendations should integrate the various resource activities, which are to be performed over the next 10 years. These activities should be designed to correspond with the landowner's objectives. They should describe in site-specific detail what, where, when, why and how to perform practices, supplemented with appendix material where appropriate.

The plan preparer will consider, describe and evaluate plan elements and their importance to the ownership when they are present. Plan elements to be considered include:

a. Acreage	k. Aspect & Topography
b. Forest Type	l. Water Resources & Aquatic Habitat
c. Species Present	m. Identification & Control of Invasive Plants
d. Age	n. Wildlife Habitat
e. Stand History	o. Recreation & Aesthetics
f. Size	p. BMPs for Known Cultural Resources
g. Tree Quality	q. Threatened & Endangered Species Present
h. Stocking & Density	r. Fire Risk & Mitigation Practices
i. Growth Rate & Vigor	s. Unique Natural Features
j. Site Quality & Soils	t. Recommended Treatment(s)

**11. FIVE-YEAR SUGGESTED SCHEDULE OF MANAGEMENT RECOMMENDATIONS**

This information will be in table format and should be similar to the following table.



VIRGINIA FOREST STEWARDSHIP MANAGEMENT PLAN

\*Landowner Name

\*Tract Number

10-YEAR RECOMMENDED SCHEDULE OF MANAGEMENT ACTIVITIES						
Year	Parcel	Activity	*Possible Cost Share	Future Stand Conditions		
				Year	Stocking	Species

This schedule may need to be adjusted depending on financial needs, timber markets, timing of actual harvest and availability of contractors.  
 \*Cost-share program eligibility requirements vary between the programs and funding may not be available. Contact your local VDOF forester for up-to-date information about the various programs.

RT – Reforestation of Timberlands Program  
WHIP – Wildlife Habitat Incentives Program

EQIP – Environmental Quality Incentives Program  
AgBMP – Agricultural Best Management Practices Program

CRP – Conservation Reserve Program  
CREP – Conservation Reserve Enhancement Program

**12. TOPOGRAPHIC STAND MAP**

The stand map should be computer generated or neatly hand drawn over a topographic map.

The topographic stand map shall include the following:

a. North Arrow	h. Direction & Distance to Nearest Town
b. Landowner’s Name	i. Roads & Trails within the Property
c. County	j. Fixed Improvements within the Property
d. Plan Acreage	k. Bodies of Water within or adjacent to the Property
e. Plan Preparer’s Name	l. Map Scale (no less than 1”:1000’, if possible)
f. Property Boundaries	m. Clearly Defined Stand Boundaries
g. Access Roads	n. UTM’s or Latitude & Longitude Coordinates

**13. OVERALL TRACT RECOMMENDATIONS (Standard Paragraphs)**

Each plan shall include information about the following topics.

a. Cost-Share Assistance	g. Water Quality Protection & Wetlands
b. Cultural & Historic Resources	h. Biological Diversity
c. Threatened & Endangered Species	i. Agroforestry
d. Forest Health & Protection	j. High-Conservation-Value Forests
e. Fire Management & Protection	k. Integrated Pest Management
f. Forest Carbon & Air Quality	m. Conservation-Based Estate Planning



### 14. STAND DATA SUMMARY TABLE

Collection of stand data is essential to making management recommendations and for future reference as the plan matures. It is important that the data is collected in a systematic and scientific manner and in enough detail to be able to formulate good recommendations. For this reason, a Stand Data Summary Table will be included in the plan. Each table will be populated with specific data collected from plots in each designated forest stand within the plan.

**STAND DATA SUMMARY** *(to be included with plan)* (Date)

Stand	Forest Type	Acres	Year Estab.	Age	Site Index	Avg. DBH	Stocking/ Density	Stand Quality	Annual Growth	Other Important Stand Attributes (nat. regen., invasive plants, etc.)

<b>Stand:</b> Identifying letter or number for each stand <b>Forest Type:</b> Pine – by primary species Pine/Hardwood – by primary species or major species group Upland hardwood – by pure species or major species group Bottomland hardwood – by pure species or major species group	<b>Site Index:</b> For dominant species present indicate base age <b>Stocking/Density:</b> Basal area or Trees per acre <b>Other Important Stand Attributes:</b> Is natural regeneration present? Are there invasive plant species present? (species and level of presence – heavy, moderate, low)
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### 15. APPENDICES

Each landowner copy of the Forest Stewardship Plan should include the Forest Stewardship Program appendix set, either as a paper copy or an electronic copy via a flash drive or a website link. The following additional appendices should be included if applicable.

a. Invasive Plant Species Information

This appendix should contain information about invasive plant species found on the property and species that could potentially invade the property. Short information briefs on invasive plant species are available at: [http://na.fs.fed.us/fhp/invasives\\_plants/weeds/index.shtml](http://na.fs.fed.us/fhp/invasives_plants/weeds/index.shtml))

## After the Plan is Completed

The consultant forester or the VDOF area forester will contact the Forest Stewardship landowner to encourage and help them begin implementing the plan’s recommended practices. They will also direct them to potential sources of financial assistance such as the Reforestation of Timberlands Program (RT), Environmental Quality Incentives Program (EQIP), Conservation Reserve Program (CRP), or the Conservation Reserve Enhancement Program (CREP), should funding be available. If necessary, they shall return to the site to provide additional technical assistance. They may also help landowners find contractors to perform the work or materials and supplies to do the work themselves.

## Future Plan Revision or Addendums

Landowners may request a revision or addendum to their Forest Stewardship Plan under the following circumstances:



- ◆ Ten years following the plan's original completion date if/when they have completed their management recommendations.
- ◆ Change in ownership and/or objectives
- ◆ Additional acreage has been added to the original parcel

New plan requests due to land ownership changes will be paid at the regular plan preparation rates. All acreage addendums and new plan requests will be subject to approval by the state stewardship coordinator.

## Plan Revision and Addendum Procedures

Revisions and addendums must follow the plan preparation procedures as established in this operating plan.

The landowner must complete another Forest Stewardship Plan application form and send it to the VDOF central office in Charlottesville. The word "REVISED" must be written in bold letters on the top of the application. If a consultant is involved, the landowner must first receive the approval letter from the state office before the consultant begins the fieldwork.

As a minimum, updates to the following plan components must be included in Forest Stewardship Plan revisions. These updates should be either incorporated into the previous plan or attached to the plan as an addendum.

1. Title Page – Same format as the original, plus the wording "Revised Plan".
2. Introductory Page – Including a short paragraph stating the reasons for the plan update, defining the scope of the update (i.e., what is included within the update and the landowner's management objectives).
3. Updated Table of Contents page that includes the plan update as an addendum to the original plan.
4. Updated Forest Type Map – computer generated if possible, including any new acreage, new roads or change in stand types.
5. Updated Topography Map – computer generated if possible, including boundary lines and Universal Transverse Mercator (UTMs) or latitude and longitude coordinates.
6. Updated Stand Descriptions – if the stand characteristics or recommendations have changed due to management activities or landowner objectives.
7. Updated 10-year timeline for entire plan acreage.
8. Include most current information on General Management Recommendations, Harvesting Recommendations, Invasive Species Management, Wetland and Riparian Zones, and Threatened and Endangered Species.

## Stewardship Forest Certification Criteria

Landowners who make substantial accomplishments toward implementing their management recommendations and reaching their goals will be publicly recognized, if possible, as a Certified Forest Steward for their accomplishments. All landowners enrolled in the Forest Stewardship Program will become recipients of various mailings on topics of interest and should remain in close contact with resource professionals so that their accomplishments can be maintained.

Eligibility

To be eligible for certification as a Certified Forest Steward, properties must be actively managed with a truly multiple-use forest management approach based upon the landowner's priorities and



objectives. This involves performing management activities that enhance the following resource areas:

Timber Growth	Aesthetics	Soil and Water Conservation
Wildlife Habitat	Recreation	Historic and Cultural Resources

Woodland livestock grazing may also be included as one of a landowner's management objectives if a portion of the property is used for that purpose.

It is important to note that multiple-use benefits do not have to be obtained on every acre. Some areas may provide only one benefit, while other areas may provide many uses. When the property is considered as a whole, however, the landowner must demonstrate active management for at least two of the above-mentioned resources.

In addition to active management, passive management within forested wetlands and streamside management zones (SMZ) will be viewed as good overall management and worth recognizing during the certification process.

Stewardship certification is a subjective decision recommended by the local VDOF area forester, forestry consultant or other forestry professional, and made by the regional stewardship coordinator or state stewardship coordinator. As a rule of thumb, landowners who have practiced no previous active management before entering the program may need one to three years to bring their properties up to program standards. However, landowners should not have to wait for certification until they have performed all practices described in their Forest Stewardship Management Plans.

## Inspection Procedure

Agency representatives, landowners or consultants may request a certification inspection for a participating property by contacting the VDOF area forester or regional stewardship coordinator. The certification inspection team will consist of the regional coordinator, the VDOF area forester and any other resource professional that had input into the plan. The landowner can also be present, if possible.

## Nomination

Any consulting, industrial, or VDOF area forester or other natural resource professional that is assisting the landowner in carrying out the recommendations in his or her Forest Stewardship Management Plan may nominate the landowner using the Form 7.11 Forest Stewardship Program Certification Inspection Record.

## Award

In recognition of certification as a forest steward, the landowner receives a letter of acknowledgment and congratulations for his achievement from the State Forester. The nominating forester schedules an appropriate recognition event for presentation of a special laser engraved walnut stewardship plaque and a "Stewardship Forest" sign for placement on the forest property. This special landowner recognition is publicized as deemed appropriate through local and statewide media and agency/organization information newsletters.

## Follow-Up Reinspection

This certification program is ongoing and includes periodic revisits by professional foresters and other natural resource specialists to keep in touch with the landowner's progress and to be available



for future stewardship management activities. After a minimum of 10 years, the forester will revisit the tract where a Forest Stewardship Management Plan was completed and reevaluate the plan, the tract and the landowner's progress to ensure that the landowner is continuing to practice good resource management.

## Minimum Standards and Basic Guidelines for Certification

These minimum standards and basic guidelines are designed to help the natural resource manager or specialist with his involvement in the Forest Stewardship Program. The natural resource professional should use these criteria as a measure of the landowner's progress and accomplishments towards forest stewardship certification.

To use the criteria, the natural resource professional must know the landowner's resource management objectives. To qualify for stewardship forest certification, a landowner must manage one of his resources intensively as his primary management objective and also designate at least one secondary resource management objective. With the landowner's objectives known, the natural resource professional can refer to the appropriate minimum standards and basic guidelines in determining whether the property and landowner should be certified.

Though a landowner may do much more than the criteria listed, these are minimum standards he must do to qualify. In addition, a special category of Preliminary Standard Accomplishments is listed. Regardless of a landowner's resource management objectives, he must meet all of these criteria to qualify for certification.

### Preliminary Standard Accomplishments

- ◆ Protection from wildfire, insects, and disease;
- ◆ Salvage of damaged timber, unless it interferes with primary and secondary resource management objectives;
- ◆ Definite plans to regenerate all lands before final harvest, unless there is a land-use change;
- ◆ Primary and secondary resources managed in a way least damaging to other resource values;
- ◆ Water quality maintained and erosion minimized by following BMPs, and
- ◆ Protection of natural heritage resources including unique plant communities, important wildlife habitat, endangered species habitat, archaeological and historical resources.

### Timber Production

Primary Objective Criteria:

- ◆ Active protection of stand from wildfire, insects, and disease by:
  - reducing wildfire hazard
  - salvaging all damaged timber in a timely manner
  - managing stand in manner that reduces insect or disease hazard
- ◆ Planned regeneration occurring soon after final harvest
- ◆ Timber harvested before biological maturity of the stand



- ◆ Stands thinned as needed to maintain vigor
- ◆ Size and shape of harvested areas compatible with other objectives
- ◆ Tree species favored and managed that are best adapted to specific sites
- ◆ Non-merchantable trees controlled as compatible with other objectives
- ◆ Stands managed toward achieving full stocking
- ◆ Livestock grazing limited to levels compatible with Resource Plan
- ◆ Forestry BMPS implemented where appropriate

#### Secondary Objective Criteria:

- ◆ Salvage of damaged timber, unless it interferes with primary objective
- ◆ Planned regeneration occurring in a timely manner after final harvest
- ◆ Stands thinned as needed to maintain vigor
- ◆ Trees which may reach biological maturity, but harvested before decline, becomes evident in the stand
- ◆ Tree species favored and managed that are best adapted to specific sites, unless it interferes with other objectives
- ◆ Non-merchantable trees managed, unless it interferes with other objectives
- ◆ Adequate stocking maintained in stands compatible with other objectives and past history
- ◆ Size and shape of harvested areas compatible with other objectives
- ◆ Forestry BMPS implemented where appropriate

## Wildlife

#### Primary Objective Criteria:

- ◆ Feature species identified and wildlife management plan followed
- ◆ Enough suitable habitat deliberately created, maintained and improved to support fairly dense populations of desired species
- ◆ Wildlife populations kept from becoming so dense they are damaging their own habitat or the habitats of other species
- ◆ Other resources managed to enhance the habitat of featured wildlife species

#### Secondary Objective Criteria:

- ◆ Desired species identified and wildlife management plan followed
- ◆ Some habitat created, maintained, and retained for desired species consistent with primary objective
- ◆ Wildlife populations kept from becoming so dense they are damaging their own habitat or the habitats of other species
- ◆ Other resources managed in ways that supply some habitat needs of desired wildlife species, considering the property as a whole



## Environmental and Recreation

### Primary Objective Criteria:

- ◆ Develop management plan to protect, enhance, utilize or restore identified natural heritage historic resources
- ◆ Recreational use specified and management plan followed
- ◆ Recreational opportunities such as picnic areas, campsites, riding or walking trails, or boat docks, etc., must be actively maintained, retained and created
- ◆ Litter controlled
- ◆ Actual recreational use of property
- ◆ Environmental impact of recreational activities minimized
- ◆ Area with hunting as recreational use must show evidence of developing hunting opportunities beyond wildlife management
- ◆ Significant accomplishments toward maintaining or enhancing aesthetics must be shown

### Secondary Objective Criteria:

- ◆ Development management plan to protect, enhance, utilize or restore identified natural heritage and historic resources
- ◆ Recreational use specified and management plan followed
- ◆ Recreational opportunities maintained, retained, and created as compatible with primary objective
- ◆ Litter controlled in recreational activities
- ◆ Environmental impact of recreational activities minimized
- ◆ Areas with hunting as recreation use must show evidence of developing hunting opportunities beyond wildlife such as hunting blinds, camping areas, etc.
- ◆ Some accomplishments toward maintaining or enhancing aesthetics must be shown. Examples include the following:
  - Retaining trees with good fall colors
  - Planting or maintaining flowering trees, shrubs, and wildflowers
  - Identifying and maintaining scenic overlooks, unique geological features
  - Improving access to scenic areas

## Soil and Water

### Primary Objective Criteria:

- ◆ Conduct all land management activities on both forest and agricultural lands in accordance with BMPs or field office technical guide (SCS)
- ◆ Significant accomplishments towards conserving soil and enhancing water quality must be shown. Additional examples include the following:
  - Completing projects suitable for BMP demonstration areas





- Rehabilitating critical areas and stabilizing old roads
- Maintaining streamside management zones and filter strips
- Manage wetlands so as to maintain or improve their functions

#### Secondary Objective Criteria:

- ◆ Accomplishment must be shown toward conserving soil and enhancing water quality. Examples include the following:
  - Maintaining cover on highly erodible lands
  - Use of BMPs on forestry and other land management practices

## Monitoring Forest Stewardship Plan Implementation

Successful implementation of landowner Forest Stewardship Management Plans, and thus sustainable forestry in practice, provides the best indication that the program is achieving its primary purpose of encouraging the long-term stewardship of non-industrial private forestlands.

Monitoring is an important component of successful Forest Stewardship Management Plan implementation; therefore, VDOF will annually monitor a portion of all management plans. The USFS's Stewardship Mapping and Reporting Tool (SMART) will generate a list of randomly selected plans to monitor each year. The state stewardship coordinator will use a random number generator to assist in selecting additional tracts from the current (10 years and younger) Forest Stewardship Management Plans to add to the SMART generated list.

Selected properties will be visited and assessed by VDOF staff to verify that current forest conditions are consistent with landowner stewardship objectives and the result of sustainable management, as defined in the landowner's approved Forest Stewardship Management Plan. A visit to a property will indicate whether that property is being managed sustainably as defined by the Forest Stewardship Management Plan. Visits to selected properties will yield a percentage of total acres visited that are being managed sustainably as defined by approved Forest Stewardship Management Plans. This percentage will be used as an indication of overall accomplishment in terms of acres managed.

Selected properties will be visited and assessed by at least two of the following resource professionals:

- ◆ VDOF area forester
- ◆ VDOF senior area forester
- ◆ VDOF deputy regional forester
- ◆ VDOF forest resource management branch staff member
- ◆ Other qualified resource management professionals

The inspection team will complete the Form 7.24 Forest Stewardship Program Monitoring Report as a method of documenting the visit and their decision of whether or not the landowner is following their Forest Stewardship Management Plan. Once the form is completed, an electronic copy of the form will be sent to the state stewardship coordinator and the original copy retained in the landowner's file.

## Accomplishment Reporting

Each State must maintain and annually report the following accomplishment data to the USFS:

1. Number of landowners assisted



2. Number of landowners educated
3. Acres covered by active Forest Stewardship Management Plans (annual increment)
4. Acres from measure #3 that are within Important Forest Resource Areas
5. Number of active Forest Stewardship Plans (annual increment)
6. Total acres of important Forest Resource Areas
7. Acres covered by active Forest Stewardship Plans (cumulative)
8. Acres from measure #7 that are within Important Forest Resource Areas
9. Acres from measure #8 that are confirmed as managed using accepted plan monitoring practices
10. Number of new or revised Environmental Quality Incentives Program (EQIP) Management Plans
11. Total acres of new or revised EQIP Management Plans.
12. Acres covered by practice or other Forest Management Plans
13. Acres from measure #12 that are within Important Forest Resource Areas
14. Acres covered by Landscape Stewardship Plans
15. Acres of Landscape Stewardship Plans that are within Important Forest Resource Areas
16. Number of seedlings produced and or distributed
17. Pounds of improved seed collected and or produced

In addition, Virginia will use the VDOF Integrated Forest Resource Information System (IFRIS) to geospatially locate Forest Stewardship Plans and accomplishments on the landscape. Virginia will use SMART to report accomplishments and upload plan boundaries in bulk using the Stewardship Accomplishment Data Loader (SADL) too.