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# Florida Forest Stewardship Workshop: Sell Your Timber for what it's Worth

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March 16, 2017; 9:00 am – 2:00 pm ET  
UF/IFAS Nassau County Extension Office, Callahan  
543350 US Highway 1, Callahan, FL 32011

Thanks for joining us today to learn the necessary steps to **get the best return on your timber investment** and **meet your forest management objectives**. This workshop will cover local timber markets, the guidelines timberland owners should follow when planning and conducting a timber sale, forest certification opportunities, and other income options.



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## Agenda:

- |          |   |
|----------|---|
| 9:00 am  | <b>Sign-in, meet and greet</b>  |
| 9:30     | <b>Welcome and introduction: start with your plan &amp; greenbelt</b> , Chris Demers and Liliana Kolluri, UF/IFAS Cooperative Extension Service |
| 9:45     | <b>Timber markets of this region</b> , Leonard Wood, Jowett & Wood, Inc.  |
| 10:30    | <b>Break</b>  |
| 10:45    | <b>Selling your timber for what it's worth</b> , Leonard Wood   |
| 12:00 pm | <b>Lunch</b>  |
| 1:00     | <b>Get your forest certified</b> , Chris Demers, UF/IFAS School of Forest Resources and Conservation  |
| 1:30     | <b>Wildlife Income Opportunity: FWC Gopher Tortoise Relocation Program</b> , Eric Seckinger, Florida Fish and Wildlife Conservation Commission  |
| 2:00     | <b>Conclusion, evaluations, adjourn</b>   |



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Funding for Florida's Forest Stewardship Program is provided by the USDA Forest Service through the Florida Department of Agriculture and Consumer Services Florida Forest Service and a grant from the Sustainable Forestry Initiative.

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<p>We appreciate the support of our  <b>2017 Florida Forest Stewardship Program Sponsors</b>  -listed on the back cover-</p>	

## Workshop Resource Contacts

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<p><b>Robin Holland</b> Silvicultural BMP Forester Florida Forest Service 8282 SE Hwy 314 Ocala, FL 34470 (352) 732-1273 <a href="mailto:Robin.Holland@freshfromflorida.com">Robin.Holland@freshfromflorida.com</a></p>	<p><b>Liliana Kolluri</b> Extension Agent UF/IFAS Extension Nassau County 543350 US Hwy 1 Callahan, FL 32011 (904) (530-6350 <a href="mailto:lkolluri@ufl.edu">lkolluri@ufl.edu</a></p>	<p><b>Leonard Wood</b> Jowett &amp; Wood Consulting Foresters PO Drawer 6339 Fernandina Beach, FL 32035 (904) 277-2467 <a href="mailto:jandwforesters@bellsouth.net">jandwforesters@bellsouth.net</a></p>

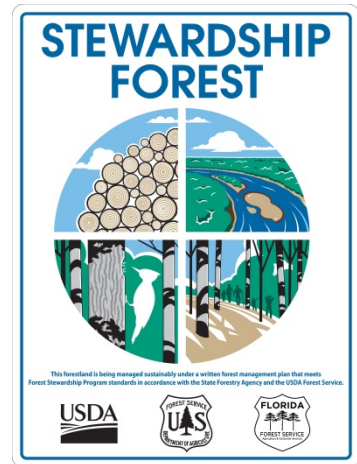
Questions about this or other Forest Stewardship Program activities can be directed to Chris Demers at (352) 846-2375, [cdemers@ufl.edu](mailto:cdemers@ufl.edu). For more information and events see the UF Forest Stewardship web site at:

[http://www.sfrc.ufl.edu/forest\\_stewardship](http://www.sfrc.ufl.edu/forest_stewardship)

# Florida's Forest Stewardship Program

**Forest Stewardship** is active management of forest land to keep it in a productive and healthy condition for present and future generations, and to increase the economic, environmental and social benefits of these lands. Forest Stewards are landowners who manage their forest lands on a long-term basis by following a multiple resource management plan.

*The Forest Stewardship Program addresses the improvement and maintenance of timber, wildlife, soil and water, recreation, aesthetics, as well as forage resources.*



## Eligibility

Private forest landowners with at least 20 acres of forest land and a desire to manage their ownerships according to Stewardship principles can participate in the Forest Stewardship Program. Also, adjacent landowners, with similar management objectives, may combine their holdings to meet this acreage limitation.

## Benefits to Landowners

- A customized management plan that is based on the landowner's objectives. The plan will include forest stand characteristics, property maps, management recommendations, and a five-year time line for future planning. This plan also serves as documentation of active management on the property that may help reduce tax liability.
- An opportunity for public recognition as a certified "Forest Steward".
- Educational workshops, tours and the quarterly Florida Land Steward newsletter developed and distributed by the University of Florida, IFAS Cooperative Extension Service and other partners.

## How to Enroll

Contact your local Florida Forest Service County Forester and tell them that you would like to have a Forest Stewardship Plan prepared for your property. More information and application online at: <http://FreshFromFlorida.com/ForestStewardship>



## Tree Farm Program

The American Tree Farm System® is a program of the American Forest Foundation and was founded in 1941 to promote the sustainable management of forests through education and outreach to family forest landowners. Nearly 26 million acres of privately owned forestland and 80,000 family forest landowners in 46 states are enrolled in this program and committed to excellence in forest stewardship. About half of all Tree Farms are located in the South.

### Eligibility

Private forest landowners with at least 10 acres of forest land and have a desire to manage their ownerships according to sustainable forestry guidelines can participate in Tree Farm.

### Benefits to Landowners

Tree Farmers are good stewards of their forestland committed to protecting watersheds and wildlife habitat and conserving soil. They manage their forestland for various reasons, including timber production, wildlife, recreation, aesthetics, and education/outreach. Tree Farmers receive many benefits:

- Representation on local, state, and federal issues affecting forestland owners.
- Exposure to a network of forestry professionals and landowners committed to sustainable forestry.
- Invitations to workshops, tours and the quarterly Florida Land Steward newsletter produced by University of Florida IFAS and other partners.
- Certification that meets international standards of sustainable forest management.
- Participation in local, state, regional, and national Outstanding Tree Farmer of the Year awards and recognition.

### Getting into the Program

Contact your local Florida Forest Service County Forester and tell them that you would like to join the Tree Farm program. More information here:

<https://www.treefarmssystem.org/florida>



# Florida Forest Service Silviculture Best Management Practices

## Silviculture Best Management Practices (BMPs)

Silviculture BMPs are the minimum standards necessary to protect our state's waterbodies and wetlands from degradation and sedimentation that can sometimes occur because of erosion from forestry operations. Silviculture BMPs should be applied on all bonafide ongoing forestry operations, especially those adjacent to waterbodies and wetlands, and may be enforced by federal, state and local authorities.

## Silviculture BMP Courtesy Checks

Silviculture BMP courtesy checks are available for landowners, land managers, and loggers. These courtesy checks provide a "report card" on Silviculture BMP implementation for recent or ongoing forestry operations. This helps future management planning and evaluates the performance of contractors on your property.

## Silviculture BMP Site Assessments

On-the-ground Silviculture BMP site assessments are available to determine which Silviculture BMPs apply to planned operations on a specific site. This helps with harvest plan development, road layout, mitigation of existing problem areas, etc.

## Silviculture BMP Notice of Intent

The Silviculture BMP Notice of Intent (Rule 5I-6 F.A.C.) is a voluntary, one-time pledge that a landowner signs, indicating intent to adhere to Silviculture BMPs on their property. Once a landowner has signed the Notice of Intent, he or she will become eligible to receive a *presumption of compliance* based on reasonable evidence with state water quality standards during future ongoing forestry operations. This is very important if a landowner's property falls within an area covered by a Florida Department of Environmental Protection Basin Management Action Plan for impaired waters.

## Additional Services

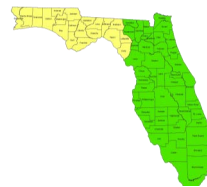
For information on the services listed above or any other services provided by the Florida Forest Service's hydrology section, please contact your local BMP Forester.

**Roy Lima**

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**Robin Holland**

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**Florida Department of Agriculture and Consumer Services**  
**Adam H. Putnam, Commissioner**





# Forestry Wildlife Best Management Practices for State Imperiled Species



- Forestry Wildlife Best Management Practices for State Imperiled Species (WBMPs) were adopted into Florida Administrative Code (Rule 5I-8) on October 21, 2014.
- WBMPs were developed through a partnership between the Florida Department of Agriculture and Consumer Services' Florida Forest Service and the Florida Fish and Wildlife Conservation Commission (FWC).
- WBMPs are **voluntary** practices designed as a practical approach for avoiding and minimizing the loss of **State Imperiled Species** due to silviculture operations.
- WBMP practices address the 16 State Imperiled Species which are considered to be potentially vulnerable to silviculture operations including ten aquatic species, two burrowing animals, and four nesting birds.
- WBMPs are designed to supplement the existing water quality-based Silviculture BMPs which already provide many valuable benefits to the conservation and management of fish and wildlife in Florida.
- Landowners and other forestry resource professionals can enroll in the voluntary program by completing a WBMP Notice of Intent. Those who do not wish to enroll will continue to be subject to all current laws and regulations regarding State Imperiled Species.
- Once enrolled, applicants who **properly implement** WBMPs will no longer be required to obtain a permit authorizing the incidental take of State Imperiled Species during bonafide ongoing forestry operations. In addition, they will not be subject to any fines or penalties associated with an incidental take of the State Imperiled Species covered by the WBMP Manual.
- WBMPs are not designed to facilitate wildlife habitat restoration or species recovery and expansion. Also, they do not address any Federally Listed Species. For information on Federally Listed Species, refer to FWC's online "Florida Wildlife Conservation Guide."
- To obtain more information or a copy of the WBMP Manual and Notice of Intent, contact your local Florida Forest Service BMP forester (see below) or a FWC Landowner Assistance Program biologist (850) 488-3831.

## Florida Forest Service BMP Foresters

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# Got Invasives?

## Invasive exotic plant problem? Find a program to help by using [FloridaInvasives.org](http://FloridaInvasives.org).

The Florida Invasive Species Partnership has collected, evaluated and categorized assistance programs into a single resource, making it easier to find the financial and/or technical assistance available to Florida landowners to prevent or control invasive exotic species problems. [FloridaInvasives.org](http://FloridaInvasives.org) has an online resource of management assistance programs to help in your fight against problematic plant species. This resource takes the guesswork out of finding the agencies or organizations offering assistance and will direct you to available programs. The Landowner's Incentives Database will also provide the requirements for each program, to help you decide if they are a good match for your needs.

### Why was [FloridaInvasives.org](http://FloridaInvasives.org) developed?

Invasive species have been identified as being costly ecologically and economically statewide in Florida. The Florida Invasive Species Partnership (FISP) is a collaboration of public and private entities in Florida, formed to link efforts at preventing and controlling invasive exotic plants across agency and property boundaries. FISP has developed an on-line tool of available financial and technical assistance sources to make it easier for landowners and land managers to find them.

### How does [FloridaInvasives.org](http://FloridaInvasives.org) help you?

FISP has created a searchable database, the [Florida landowner incentives database](http://FloridaInvasives.org), accessible at [FloridaInvasives.org](http://FloridaInvasives.org) that allows you to find an assistance program for your needs. Search by your county, target species or other pertinent information into the online tool, and you will retrieve a current list of available programs.

[FloridaInvasives.org](http://FloridaInvasives.org) will help provide focus to your search so that you can get the right person at the right program.

[FloridaInvasives.org](http://FloridaInvasives.org):

- Builds community awareness,
- Leverages limited resources through cooperation and
- May reduce individual land management costs.

This resource will be regularly updated with the most current program information to provide you the most up-to-date opportunities.

Go to [FloridaInvasives.org](http://FloridaInvasives.org) to find out more.

Species Shown from top to bottom:

Mexican Petunia, Boston Fern, Mimosa, Cogongrass, Camphor



*Think Locally, Act Neighborly*

invasive species know no boundaries!



# Have Land? Get a Plan and Stay Connected

**Chris Demers**

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[http://sfrc.ufl.edu/forest\\_stewardship](http://sfrc.ufl.edu/forest_stewardship)

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FOREST RESOURCES  
& CONSERVATION

## Start with a Plan



- Your plan is your road map from where you are to where you want to be.

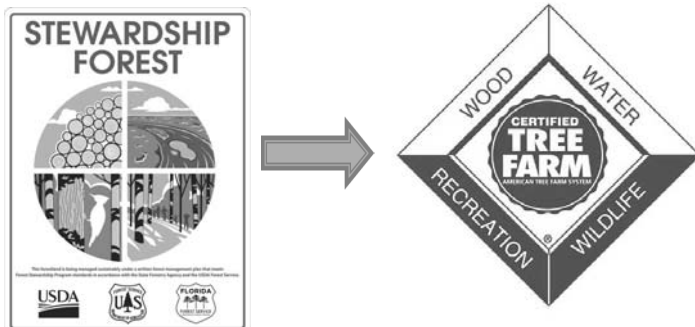
## Ok, but do I *really* need a plan?

- **Cost-share programs**
  - USDA, FL Forest Service, other programs
- **Certification / recognition programs**
  - Tree Farm (American Forest Foundation)
  - Sustainable Forestry Initiative
  - Forest Stewardship Council
  - Forest Stewardship Program (FL Forest Service)
- **Demonstrate bona fide timber management for Greenbelt assessment**

## What's in a Management Plan?

- Your goal, objectives
- Property location, history
- Resource assessment
- Management recommendations
- Map, activity schedule (usually 5 years)
- Supplemental information
  - Contacts, aerial photos, records, receipts, notes, etc..

## Get a Plan



## Best Management Practices



- **Silviculture Best Management Practices**
  - Minimum standards to protect water quality
  - Exceed if you can
- **Wildlife Best Management Practices**
  - Voluntary practices to protect State Imperiled Species of wildlife



## Get Assistance

- Consultants
- Florida Forest Service
- Florida Fish and Wildlife Conservation Commission
- USDA Natural Resources Conservation Service
- University of Florida / IFAS
- Others: Florida Forestry Association, Soil & Water Conservation District, National Wild Turkey Federation, Southern Regional Extension Forestry, ...



## Florida Agricultural “Greenbelt” Classification

Liliana Kolluri  
UF/IFAS Nassau County Extension

UF | IFAS Extension  
UNIVERSITY OF FLORIDA

## Florida Statute FS 193.461

- Only lands used for “bona fide agricultural purposes”
  - “Good faith commercial agricultural use of the land”
    - By January 1<sup>st</sup>
- Owner must file DR-482 by March 1<sup>st</sup>
  - Additional information questionnaire

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## Criteria for Consideration

- Time/continuity of land use
- Accepted commercial agricultural practices
  - BMPs
- Purchase price
- Size
  - Recommended 10 acres for timber
- Leases
- And more...

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## Additional Info for Timber Operations

- OK if trees are not planted by January 1<sup>st</sup>
- Following items required:
  - Forest Management Plan
  - Contract for purchase of trees
  - Contract with planter
  - Property cleared & prepped for planting
  - Copies of any required licenses, permits, or leases

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## Additional Info for Timber Operations

- Agricultural Classification based partly on merchantability of timber
  - Predominantly pine
  - Everything else case-by-case

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## Timeline

- By January 1<sup>st</sup>:
  - Forest Management Plan
  - Site cleared/prepped
  - Contracts for purchase & planting
  - Any leases in effect
- By March 1<sup>st</sup>:
  - DR-482 & Additional information questionnaire
  - Completed tax return
  - Copies of lease, licenses, permits, certificates



## Timeline

- Notice of acceptance or denial by July 1<sup>st</sup>
  - If accepted, automatic renewal
  - If denied, appeal to value adjustment board



## For More Information

- UF/IFAS Nassau County Extension
- UF/IFAS Florida Forest Stewardship
- U.S. Forest Service
- Nassau County Property Appraiser




## Contact Info

Liliana Kolluri  
UF/IFAS Nassau County Extension  
Ph: 904-530-6356  
Email: lkolluri@ufl.edu



# Marketing Your Timber

Presented by Leonard Wood, ACF, CF  
Jowett & Wood, Inc.



## Area Timber Markets . . . . . . and How They Work



### Products

- Pine Pulpwood
- Pine Chip-n-Saw
- Pine Sawtimber
- Pine Poles
- Hardwood Pulpwood
- Hardwood Sawtimber
- Cypress



### Area Mills and Products

• Pulp	4
• Chip-n-Saw	3
• Sawtimber	3
• Pellets	1
• Mulch	2
• Fuel	vary
• Poles	3



### What do you own?

- **Merchantability**
  - Size of Trees
  - Age
  - Acres
  - Logability
  - Distance to Markets
- **Cruise**
- **Map**



### Types of Sales

- **Lump Sum**
- **Per Ton Product**
- **Per Ton Composite**





## Timber Sale Contract

- **Mandatory Items**
- **Sources**



## Logging Basics

- Cut and Load
- Hauling
- Clear Cuts
- Thinning



# FOREST CERTIFICATION



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FOREST RESOURCES  
& CONSERVATION

## What is Forest Certification?

- **System** to recognize and promote environmentally responsible forestry and the sustainability of forest resources
- **Process** of labeling wood that has been harvested from well-managed forests. Standards include:
  - ✓ Environmental / Ecological
  - ✓ Economic
  - ✓ Social
- **Driven** by consumer demand for wood harvested from sustainably managed forests, as well as landowner interest in sustainable forestry.

## Why Did Forest Certification Arise?

- **Environmental awareness and concern**
  - **1960's-70's:**
    - Environmental/Forestry legislation:
      - Multiple Use and Sustained Yield Act of 1960
      - Clean Water Act of 1972 impacted forest management on all lands.
  - **1980's:**
    - Despite the legislation, increasing public scrutiny of forest practices.
    - Concerns included global forestry issues, such as tropical deforestation.



## Certification Standards Born

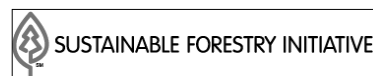
- **1990's:**
  - **Certification standards developed** – Global forest stakeholders developed forest practice standards that are now the framework for today's forest certification programs.
  - **1992 UN Conference on Environment and Development (Rio Earth Summit)** – Established vision of sustainable development
  - **1993 Montreal Process** – Working Group on Criteria and Indicators for the Conservation and Sustainable Management of Temperate and Boreal Forests
    - FSC and SFI Standards originated from these criteria



## Types of Certification Systems

- **Forest Management Certification**
  - Forest management evaluated against sustainability standards. Can be issued as standard or group.
  - **Standard Certification**
    - Landowner or organization certified individually and subject to periodic audits.
  - **Group Certification**
    - Group of landowners or organizations certified collectively as one group or under one certificate holder.
      - **Lower cost** - small sample of owners' property is audited annually
- **Product Certification - Chain of Custody**
  - Wood is tracked from certified forest to finished product.
    - Involves mills, manufacturers and retailers. Finished product has label or logo identifying the certification system.
    - FSC, SFI, Program for Endorsement of Forest Certification (PEFC)

## Major Forest Certification Systems



## Forest Stewardship Council

### “Forests For All Forever”



- **International** - began in 1993 to address tropical forestry, expand to include temperate and boreal forests
- **Standard and Group Certification**
  - Many certification bodies worldwide – 3 in US:
    - Rainforest Alliance, Scientific Certification Systems Global, and Bureau Veritas
  - Annual office and field audit, auditors accredited by FSC Accreditation Services International
  - Rigorous standards and high audit cost
- New **Small and Low-Intensity Managed Forest Standards** for Family Forests: 1,000 hectares (2,470 acres) or less.
- **Forest and Product certification** –
  - **chain of custody** monitored to ensure all or portion of material in the final product is from certified sources
  - Emphasis on **environmental and social** criteria
  - More at <https://us.fsc.org/>



## Sustainable Forestry Initiative

### “Good for you, Good for our forests”



- SFI, Inc. is independent 501(c)(3) charitable organization – manages the SFI program
  - Fully independent, Governed by SFI Board, State SFI Implementation Committees
  - **SFI Board: 3-chamber**, representing
    - Environmental
    - Economic
    - Social
- **Forest and Product Certification** - General emphasis on **management and operations balanced with environmental and social criteria.**
  - Land management standards
  - Domestic and international fiber sourcing standards
  - Research, training, legal, and social standards
- See standards at <http://sfiprogram.org/>



## American Tree Farm System

### “The Sign of Sustainable Forestry”



- “Tree farming” started in the 1940s to introduce the public to the capabilities of sustainable forestry.
- The first Tree Farm was established in 1941 by Weyerhaeuser in Montesano, WA.



## American Tree Farm System

### “The Sign of Sustainable Forestry”



- Today Tree Farm administered by **American Forest Foundation**, <https://www.treefarmssystem.org/>
- State Tree Farm Programs
- Group Certification
  - Regional, State or Independently Managed Groups
- Eligibility
  - Private or public ownership 10 to 10,000 acres
  - non-industrial - no publicly traded companies, small business allowed
  - Commitment to sustainable forest management and conformance with standards



## American Tree Farm System

### “The Sign of Sustainable Forestry”



#### Standards include:

- Written management plan
- Compliance with laws, BMPs
- Reforestation, afforestation
- Wildlife habitat, biodiversity, invasive species control
- Aesthetics
- Special or historical sites
- Practical harvesting guidelines



## American Tree Farm System

### “The Sign of Sustainable Forestry”

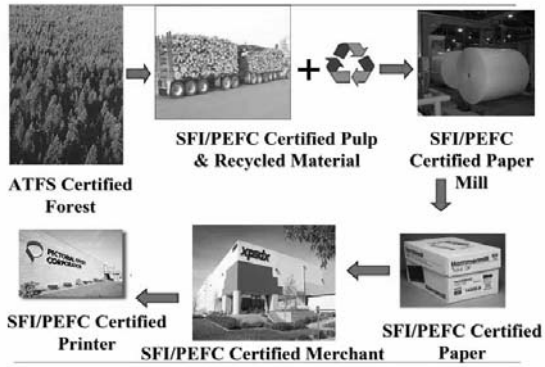


#### Forest and Product Certification

- **Lands certified by the American Tree Farm System are a source of fiber for the Sustainable Forestry Initiative (SFI, Inc.) and PEFC chain of custody programs.**
- Certified Tree Farmers get a certificate number for chain of custody tracking.
- In 2016 “states decision” - certification or recognition?
  - Florida and most states are on the certification track.
- In 2017 the Florida Tree Farm program gained 501(c)(3) status.



## Chain of Custody Example



## Why Get Your Forest Certified?

- Market premiums (?)
- **Market Access** –
  - Many mills/companies need some certified wood
  - Some only buying certified wood or final products
    - McDonalds now requiring 100% certified packaging material
    - Europe very green – some export markets 100% certified
  - Green Building Certification <http://www.usgbc.org/leed>
    - US Green Building Council LEED standards - FSC Standards only
    - 2016 – new compliance path for “responsibly sourced” domestic wood includes SFI and PEFC
- Energy wood and carbon trading markets

## Why Get Certified?

- Workshops, tours, webinars, other educational opportunities
- Connection to a network of landowners, foresters, extension, natural resource professionals
- Newsletters, magazines, web resources
- Representation on important policy issues







## Gopher tortoise

- State-listed threatened species
- Candidate for Federal Listing (ESA)
- Lifespan 40 to 60 years
- Reproductive maturity at 9 to 21 years
- Low reproductive rate – 6-8 eggs per year
- Only native tortoise in Florida



## Gopher Tortoise Relocation Program

Florida Forest Stewardship Workshop  
March 16, 2017

MyFWC.com



## Habitat

Scrub



Longleaf pine



Pine flatwoods

Coastal dunes



MyFWC.com

## The burrow

- Average 7 feet deep and more than 15 feet long
- A tortoise can have more than one burrow within its home range
- The openings to gopher tortoise burrows are distinctly half-moon shaped
  - The size of the opening is proportional to the width of the tortoise

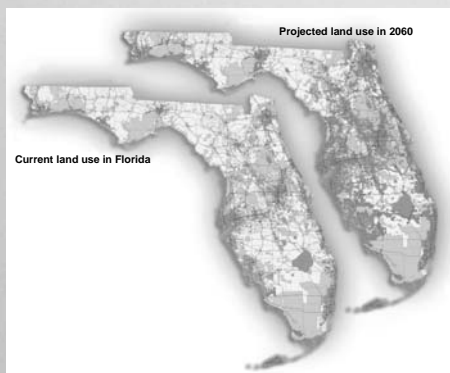


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## Why are gopher tortoise populations declining?

- Habitat loss
- Fragmentation
- Degradation
- Disease
- Illegal harvest



MyFWC.com

## Management plan (approved 2012)

- Goal - *To restore and maintain secure, viable populations throughout Florida so the species no longer warrants listing*
- Objectives include:
  - minimize loss of tortoises,
  - increase and improve habitat
  - enhance and restore populations
  - maintain the tortoise as a keystone species
- Suite of conservation strategies include regulation, **permitting**, and law enforcement



MyFWC.com

## Gopher tortoise permitting guidelines

- Approved in April 2008; subsequent revisions are approved frequently
- Permits provide authorization to impact tortoises and their burrows and to relocate gopher tortoises to approved sites
- Permits are conditioned so that activities must be conducted in accordance with F.A.C. rules and FWC guidelines



## Activities that **do not** require a permit

- Routine agricultural practices
- Silvicultural activities
- Wildlife management activities
- Linear utility and highway right-of-way vegetation maintenance
- Routine yard maintenance that does not damage a burrow

### Best Management Practices (BMPs)



## Gopher tortoise conservation depends on participation of public and private lands



## Recipient sites



## Preferred attributes for gopher tortoise recipient sites

- Well-drained sandy soils
- Open tree canopy with extensive groundcover of grasses and other soft-stemmed leafy plants
- Long-term protection of larger tracts of suitable habitat
- Low resident gopher tortoise population
- Periodic habitat management



## Recipient site permit types

- Long-term protected recipient sites (permit does not expire)
- Short-term protected or unprotected sites (permit is valid for two years, with ability to renew/extend)
  - Contact information of landowner and Authorized Agent
  - Recipient site location and acreage
  - Maps
  - Gopher tortoise habitat and existing population



## Minimum criteria for short-term protected or unprotected recipient sites

- At least 25 acres of gopher tortoise habitat
- Soils with DWT of more than 1.5 feet - preferred (DWT of more than 1 foot if provides tortoise habitat)
- Canopy closure less than 60%
- Herbaceous groundcover greater than 30%
- Compatible land uses to maintain tortoises and their habitat



## Criteria for long-term protected sites

SITE CHARACTERISTIC	ACCEPTABLE CRITERIA	DESIRABLE CRITERIA
Size	> 40 acres	> 250 acres
Soil	> 45 cm DWT, with land cover verification for Flatwoods sites >31 cm (select cases)	>130 cm DWT
Habitat	> 30% herb cover < 60% canopy cover	>50% herb cover <40% canopy cover
Enhanced Conservation Value		Adjacent to protected land, or in Strategic Habitat Conservation Area, or ≥75% native upland community (maximum of 0.5)
Stocking Rate	Two per acre (requires all above criteria be satisfied)	0.5 for each site characteristic that is satisfied up to a maximum of two additional (four per acre maximum)



## Long-term protected recipient sites

- Acceptable Criteria (2 tortoises/acre)
- Density bonus (0.5 tortoise/acre) for meeting each desirable criteria, up to 4/acre maximum
- Management Plan
  - Management activities/cost/schedule
  - Proposed compatible land uses (i.e. silviculture)
  - Livestock grazing plan (if applicable)
  - Mortality Contingency Plan
- Conservation Easement
- Financial Assurance – Trust Agreement
- Periodic monitoring of gopher tortoise populations



## Monetary incentives and advantages for long-term protected recipient sites

- Potential to charge more for each gopher tortoise
- Potential for site to be approved for higher density if property meets “desirable” criteria
- Mitigation lower per tortoise to long-term sites

PERMIT TYPE	MITIGATION CONTRIBUTION
<b>10 or Fewer Burrows</b> <i>tortoises are relocated on-site or off-site</i>	\$206
<b>Conservation</b> <i>&gt;10 burrows relocated to long-term site</i>	\$206 for first group of 10 burrows \$309 each additional tortoise
<b>Conservation</b> <i>&gt;10 burrows relocated to short-term site</i>	\$206 for first group of 10 burrows \$3,093 each additional tortoise



## Financial considerations

- Hiring an Authorized Gopher Tortoise Agent
- \$515 application contribution (one-time submittal)
- Construction of enclosures or permanent fencing (recurring or periodic)
- Habitat management (recurring)
- Monitoring (recurring - every 3 years)



## Temporary enclosures



# Habitat management

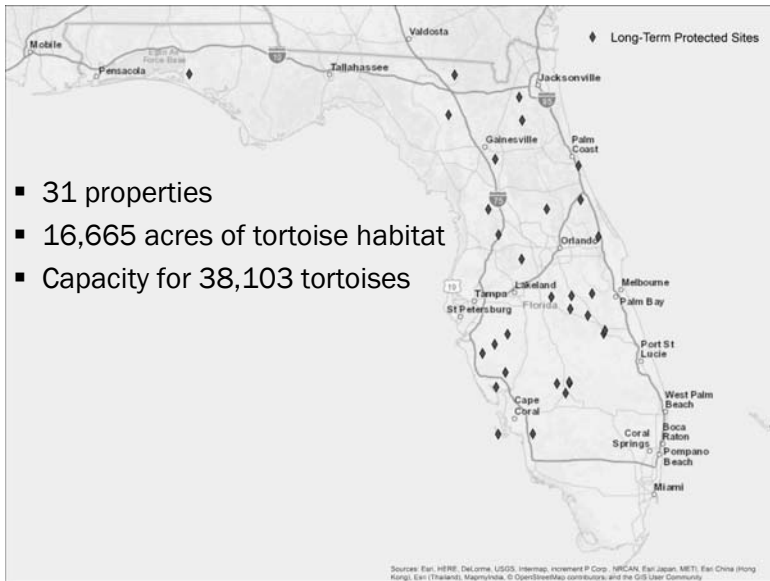


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# Monitoring



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- 31 properties
- 16,665 acres of tortoise habitat
- Capacity for 38,103 tortoises

Sources: Esri, HERE, DeLorme, USGS, Intermap, increment P Corp., NRCAN, Esri Japan, METI, Esri China (Hong Kong), Swisstopo, Mapbox, © OpenStreetMap contributors, and the GIS User Community

# Financial benefits

- Varies depending on the property
- Compatible with wetland mitigation banks, quail plantations, and other land uses
- Maximum potential of up to 4 gopher tortoises per acre on suitable habitat (multiplied by per-tortoise assessment collected)
- Amount per tortoise can range \$800-\$1,200



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# Conservation objectives

- Applied habitat management on protected lands (both public and private)
- Increase protected gopher tortoise habitat
- Restock tortoises into protected, managed, suitable habitats where densities are low
- Decrease gopher tortoise mortality on lands proposed for development



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# Gopher Tortoise Conservation Biologists

- Eric Seckinger: Northwest and North Central Regions
- Samantha Dupree: Northeast Region
- Eric Sievers: Southwest Region
- Rachel King: South Region



Allen Broussard Conservancy



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# Steps to Marketing Timber<sup>1</sup>

Chris Demers and Alan Long<sup>2</sup>



Marketing timber involves selling forest products in a competitive market to get the best return on your investment or to meet other objectives. This process requires some planning and pre-sale preparation before you advertise or talk to prospective buyers. Timber sales should be approached in a business-like manner to ensure that both the seller and buyer are satisfied with the results. Following are some important guidelines to follow when planning and conducting a timber sale.

## Start with Your Objectives and Financial Situation

Timber is sold for many reasons. The most obvious reason is to convert the timber asset into money. However, the decision to sell timber should be based on the objectives

you have for your land. You may harvest trees in order to regenerate or improve the future value of a stand, reduce stand density (thinning), salvage damaged timber, maximize profits, improve wildlife habitat, or develop recreational opportunities. These types of management decisions should start with a written management plan, which outlines your objectives, identifies the steps necessary to achieve them, provides a timetable to guide management activities, and is the first step to a successful harvest.

## Consider Your Tax Situation

How you treat the expenses and income associated with your forestland for tax purposes depends on the scope and nature of your timber-related activities. If you have a small holding with occasional transactions, you would most likely treat these activities as an investment. If your holdings produce regular and continuous transactions, your forestland may constitute a business. Regardless of your tax status, it is extremely important to maintain thorough records for all management activities and costs.

Money from a timber sale could significantly raise your taxable income, but part of that money is your investment, or basis, in the timber sold. The basis must be adjusted up for new purchases or investments and down for sales and disposals. In general, it is most often advantageous to report your timber sale income as a capital gain rather than as ordinary income. Capital gain income is taxed at a lower rate than ordinary income and is not subject to the self-employment tax. These points are made to emphasize

1. This document is SS-FOR-17, one of a series of the School of Forest Resources and Conservation Department, UF/IFAS Extension. Original publication date January 2002. Revised February 2013 and March 2016. Visit the EDIS website at <http://edis.ifas.ufl.edu>.

2. Chris Demers, forest stewardship coordinator; and Alan Long, professor (retired); school of Forest Resources and Conservation; UF/IFAS Extension, Gainesville, FL 32611.

the importance of considering federal income taxes and knowing your tax status before planning a timber sale, but they are by no means complete. Consult a tax attorney, certified public accountant or a knowledgeable forester about your specific tax situation. For the latest timber tax updates and information see <http://www.timbertax.org/>.

## Financed Property

If your property is financed, the timber on it is probably covered by the mortgage and, if so, might be part of the lender's collateral. If it is, the lender will require notification and may require that all or a part of the proceeds from a timber sale be applied to the loan. Regardless, the timber buyer will need a release from the mortgage. This will need to be determined and all relevant arrangements made in writing with the lender before you sell timber in order to avoid future legal or financial complications.

## Know What You Are Selling and Its Value

To determine the value of the timber you are selling you should know what products you have to sell. Unless you have experience with forest inventory, it is best to seek the services of a professional forester for this. A forester can accurately estimate the number and volume of trees by product class and then appraise the current market value of the timber you want to sell. This is extremely important because the price of different product classes can vary significantly and will dictate in part how much the buyer will pay for the timber. This information will be worth the price of the inventory when it is time to sell. As with some other forest operations, per acre costs for inventory tend to increase for small properties and non-uniform stand conditions.

Your timber is worth as much as the buyer will pay for it at a certain time. This price is determined by current market conditions, local competition for particular tree sizes, mill requirements, difficulty of logging a site, harvesting equipment, total volume in each product class, size of the sale, volume per acre, quality of the timber, and distance to different mills. All these factors interact to cause timber prices to vary considerably from place to place and over time, and this variability will affect the price a buyer will pay for your timber. In addition, each buyer may have a different set of cost constraints that will influence what the buyer can offer for a particular sale.

## Time Your Sale Strategically

Try to sell your timber when prices are high relative to past prices and expected future values. It is easy to compare current and past prices, but anticipating how prices will change in the future is much more difficult. This requires some knowledge about the behavior of timber prices and markets over time.

Timber price trends have two components: long-term trends and short-term fluctuations. Long-term trends are controlled by major economic factors such as building construction, global paper consumption, foreign currency exchange rates, mill openings and closures, and availability and accessibility of timber resources locally and in other regions. These market trends last for periods of years or decades. Short-term fluctuations often coincide with the seasons or certain weather conditions. Over much of the South, periods of very wet weather can inhibit loggers' ability to harvest timber, resulting in a decreased timber supply and subsequent increased prices. Conversely, timber prices tend to decrease or remain stable during dry weather, when timber is more accessible and supplies increase. As a rule of thumb, it is best to sell timber when current prices are above the long-term trend line. Take advantage of active market periods and avoid selling, if possible, during periods of decreased demand for your products. The advantage of growing trees is that you can usually "bank on the stump" until market conditions improve. Salvage sales after fires or hurricanes obviously do not enjoy this luxury. Information about the timber market can be obtained by subscribing to timber market periodicals and checking with local timber buyers, foresters, and forest owners.

To track trends, you can obtain average prices for the past 3 to 12 months from your local UF/IFAS Extension office.

## Decide on a Selling Method: Negotiation or Sealed Bid

The two selling methods used in the South are negotiation and sealed bids. In a **negotiation**, the seller arrives at a price after negotiating with one or more potential buyers. This method may yield a fair price but it may not be as high as the value of a bid sale that receives responses from a larger number of potential buyers. Sellers do not usually have as much information about current market values as the buyers in a negotiation. However, negotiation is necessary and appropriate when: the tract is small and/or irregular; small volumes are sold per acre; timber is sold from a thinning or salvage sale; there are few mills within a reasonable trucking distance; specialty products are sold;

and when the seller prefers or has a previous working relationship with a certain buyer.

In a **sealed-bid** timber sale, the seller advertises the sale to as many prospective buyers as possible. The seller may specify a minimum bid or the right to refuse all bids. Potential buyers submit confidential written offers that are opened at a specified time and place. Each bidder is allowed a single bid and no bids are accepted after the bid closing. Sealed bids are most appropriate when the area to be harvested is large and uniform (i.e., clearcut harvest). Sealed bids historically have yielded the highest price to the landowner and take advantage of competition among buyers. Generally, the likelihood of finding a buyer who is willing and able to offer a high price increases with the number of bids. This selling method is not suitable for small, irregular tracts; and it eliminates opportunities for negotiation.

## Decide on a Payment Method: Lump Sum or Pay-As-Cut

A critical step in marketing timber is deciding on the payment method. The two methods of payment for timber are lump sum and pay-as-cut. In a **lump sum** payment, the seller and buyer agree, either by negotiation or through the bid process, on a total price for the timber before it is cut and the full payment is made at contract closing. A lump sum can also be paid in installments. This payment method is best when the sale boundary is easily defined and the timber to be cut is uniform. The advantages of lump sum payments for sellers are that they receive full payment before harvesting begins and risk of timber loss is transferred to the buyer. When sealed bids are used for lump sum sales the seller uses competition among buyers to find the buyer willing to pay the highest price, and the landowner may benefit if a particular buyer overestimates the amount of timber in the sale. On the other hand, and depending on the circumstances, some bidders may offer a lower price for lump sum than they would for pay-as-cut because of their costs for: (1) spending time to accurately determine the amount of timber in the sale before they bid; (2) financing the money they would pay you before the harvest begins; and (3) shouldering the risk of loss once the bid is accepted. Keep in mind that this type of sale may take longer to complete because both the seller and buyer should have an accurate inventory of the products to be harvested. Therefore, it may not be the best method when trying to salvage timber after a fire, storm, or other disaster.

The **pay-as-cut** payment, or *scale sale*, is the most common method of selling timber. This type of sale requires the seller and buyer to agree on per-unit prices and specifications for each product before harvesting. There is usually an initial advance payment or deposit, with subsequent payments as the timber is harvested. The seller retains ownership of the timber and risk of loss until it is harvested. This method is best when: the seller needs to sell quickly, thinning, harvesting areas with difficult or uncertain access, a timber cruise will be difficult or inaccurate because of non-uniform conditions, or when the seller wants to ensure capital gains tax treatment of income. Close monitoring of this type of sale is critical because improper sorting of the timber products by the logger can significantly reduce the income from the sale. Another disadvantage of this kind of sale is that the total amount of income is unknown until the end of the sale.

*Tax tip:* income from both lump sum and pay as cut timber sales can generally be treated as capital gains if your woodland is categorized as a business or investment.

## Advertise the Sale and Select a Buyer

The sale advertisement or notice of a sealed bid sale should include specific information about the sale and be distributed to as many prospective buyers as possible. County foresters can provide a list of reputable timber buyers in your area. The following items should be in the notice:

- **Your name, address, and phone number** and/or that of the forester managing the sale.
- **The location of the timber.** A map, legal description, and directions, as well as how the sale boundaries will be marked.
- **Description of the timber.** Keep this general, such as all timber or timber within a specific unit.
- **Type of bid.** Lump sum or pay-as-cut.
- **Time when buyers can inspect the sale area.** Usually at least one month is allowed between the notice and bid opening.
- **Date, time, and location of bid opening and notification of winning bidder.** Also notify all unsuccessful bidders promptly.
- **Down payment.** This is not necessary, but if you require it, an amount of 5 to 10 percent of the bid price is reasonable and should be returnable to unsuccessful bidders.

- **Provisions for payment.** Specify preference for a personal or certified cashier's check and time of payment.
- **Limitations or special ownership considerations.** Include provisions for best management practices, harvesting deadline, access restrictions, times when loggers cannot operate (e.g., during wet weather), leave trees for wildlife, restoring roads, etc.
- **Performance bond requirement.** Often 10 percent of the sale price (less on large sales) is held in escrow to ensure that the buyer abides by the contract terms. The deposit is refunded immediately following the sale given adherence to contract requirements.
- **Insurance requirements.** Always insist on a certificate of insurance: workers compensation, general liability, and vehicle.
- **Requirement that a Master Logger conduct the logging operation.**
- **Statement of the right to refuse all bids.**
- **A copy of your timber sale contract if you have one you prefer.**

Sale notices can be distributed to potential buyers by mail, fax, personal delivery, or as some sellers now do, through the Internet. You may want to know something about the potential buyers' credentials and reputations. Choose carefully the recipients of your notice. Once you advertise for bids, you are obligated to sell your timber to the highest bidder, unless you do not want bidders on your next sale. The Florida Forestry Association maintains a Master Logger Directory, which lists loggers that have completed an educational program in safety, proper harvesting techniques, business management, and environmental protection and regulations. This directory is available online at <http://www.floridaforest.org/>. Many mills will not purchase timber today unless the loggers have completed the Master Logger program. A poor logging job may be expensive to correct.

## Contract with a Buyer

The sale transaction must include a formal, legally binding, written agreement specifying the responsibilities and expectations of both parties. A well-written sale contract will save both the seller and buyer money by eliminating problems, or even litigation, that can result from misunderstandings. The contract will ultimately serve as the mechanism by which any disputes are resolved.

The contract does not need to be lengthy or complex but it must reflect the expectations and responsibilities of the

seller and buyer. An effective timber sale contract will contain the following provisions:

- **Identification of parties.** Include addresses, phone numbers, and e-mail.
- **Method of payment.** This should specify the amount the purchaser agrees to pay the seller as a lump sum or pay-as-cut as well as how the buyer will provide verification of the amount of timber cut and paid for.
- **General description of timber sold.** Describe how the trees or harvest area will be marked, and a provision for trees that grow into a merchantable size during the contract period.
- **Care of property.** Describe each part of the property that could be subject to damage (i.e., fences, roads, bridges, buildings, nest boxes, residual trees, etc.). Include allowable limits of damage and provisions for repair or payment for damages.
- **Arbitration.** Specify a method for settling disputes. Arbitration panels are generally preferred over litigation in courts.
- **Guarantee of ownership.** All buyers will require a title search and an abstract that show clear ownership, especially if a lump sum payment is agreed on.
- **Right of ingress and egress.** Provide buyer the right to come and go to remove timber. Specify entrances and roads to use.
- **Harvest method.** Address the layout of log decks, log roads, and areas to be cut. State any restrictions on equipment use and logging during wet periods or other times (e.g., hunting season). Include provisions for use of Silvicultural Best Management Practices, compliance with environmental regulations, local ordinances, and specify that you reserve the right to inspect the logging site and, if necessary, halt all operations.
- **Penalties for noncompliance.** Detail penalties for noncompliance with contract terms. Address penalties for activities such as cutting non-designated timber, as well as for damaged property, including damages to adjacent landowners' property. Specify provisions for payment of penalties and an escrow account or performance bond.
- **Length of agreement.** State the beginning and end dates of the agreement and provisions for or against renewing the contract if it expires before harvesting is complete.
- **Insurance requirements and indemnification of seller.**



- **Bottom line.** Signatures of all parties, signature dates, notarization of agreement, and registration at the courthouse.

In addition to the above contract provisions, you may wish to consider additional clauses to cover special situations. One that can prevent many problems is a statement for or against assignment of the contract to a third party. You may be fully protected by the contract between you and the buyer but that protection may be compromised if the buyer reassigned the contract to another logger or mill.

Try to prepare a short contract with clauses that are relevant and important to you. Long, complicated, restrictive contracts may scare buyers away and make supervision of the operation difficult. Buyers sometimes have pre-written contract forms, which may satisfactorily reflect your objectives, but the decision to use a buyer's contract should be based on sound legal advice.

## Supervise the Operation

Review the contract with the logger, timber buyer, or forester before harvesting begins; and be sure they understand your harvest objectives. If they know you and are familiar with your objectives they should make a greater effort to do a good job; their reputation depends on it. You and/or a forester should visit the area frequently once the operation begins to make sure it is in compliance with the contract terms. Violations of the contract should be addressed immediately. Once the harvest is complete according to the terms of the contract, write a letter releasing the buyer from the contract and refund the performance bond.

## Assistance

Professional foresters can assist you in selling your timber. Consulting foresters, county foresters, and industry foresters are all available in varying capacities to help you through the process. Consulting foresters can perform all duties of the sale, including an inventory, the sale contract, and harvesting supervision for a fee. Research has shown that timber sales handled by qualified consultants consistently bring significantly more money than sales sold by landowners on their own. Landowners can get a directory from the Association of Consulting Foresters (ACF) or can go to ACF's website to find an ACF member in their area. The Florida Division of Forestry also maintains a consultant directory, by geographic area, that is available free to landowners. See <http://edis.ifas.ufl.edu/FR125> for tips on selecting a consulting forester.

County foresters' services are free but they are limited to technical advice on management practices and management plan preparation for properties 160 acres or less. Your county forester can be found in the phone book under State Government Offices, Florida Division of Forestry.

Industry foresters can also provide management and marketing assistance via their landowner assistance program (LAP), which can be found under timber company names in the phone book or on the Internet. A typical LAP is free of charge and helps with timber sales, reforestation, mapping, and other land management tasks.

Other recommended sources of assistance include an attorney for counsel on the sale contract and an accountant, for advice about the sale with respect to your specific tax situation.

## Conclusion

Marketing your timber or other forest products is usually the culmination of a long investment strategy and a means to reach a variety of resource management objectives. It deserves patient planning, careful consultation and a keen knowledge of what and why you are selling. It is also the beginning of the next management period for your property. Planning for forest regeneration should be as much a part of your sale as wise marketing.

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