A FORESTER'S GUIDE TO

MY SIERRA WOODS - TUOLUMNE

Welcome!

This document is a self-guided orientation tool, designed to assist foresters contracted with My Sierra Woods in building a clear understanding of our program, processes, and expectations.

Should you have any questions or concerns about the content, contact:
Chantz Joyce (cjoyce@forestfoundation.org; 530-524-9563)

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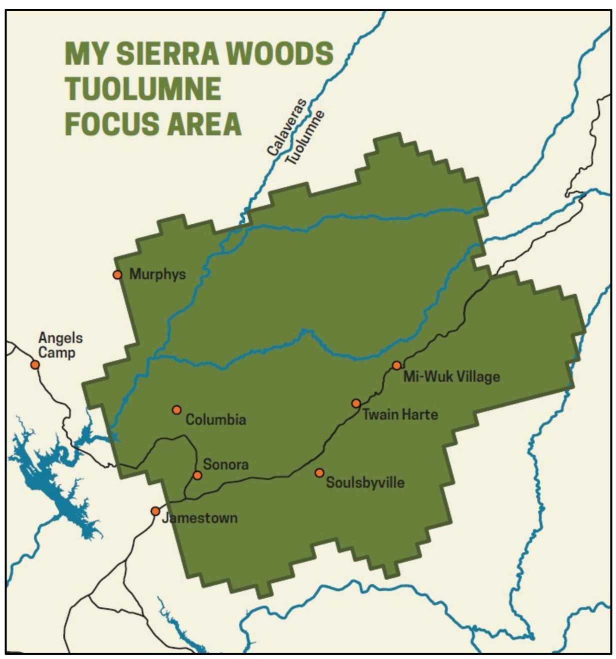
Last updated: March 2022

What is My Sierra Woods?
My Sierra Woods is a local partnership dedicated to protecting and restoring the conditions of family forest lands in northern California. We do this by empowering private landowners to mitigate catastrophic wildfire risk and restore forest health through fuels reduction projects. My Sierra Woods is administered by the American Forest Foundation (AFF) in collaboration with local organizations.

My Sierra Woods was created in 2017 in partnership with the California Tree Farm Program, with the goal of building a pipeline of private landowners interested in taking action to reduce fire risk and restore forest health. In 2018, the My Sierra Woods partnership received a $9M California Climate Investments Forest Health Grant to deliver technical and financial assistance across 12 northern California counties — Siskiyou, Modoc, Trinity, Shasta, Lassen, Tehama, Butte, Yuba, Plumas, Nevada, Sierra, and Placer. By the end of 2021, My Sierra Woods had connected 500 landowners collectively owning 360,000 acres with registered professional foresters and supported nearly 200 landowners collectively owning over 19,000 acres in conducting fuels reduction treatments.

While these metrics demonstrate that our My Sierra Woods team was successful at scaling private lands engagement and treatment, our impact to-date has been diluted across a 12-county footprint. Going forward in 2022, My Sierra Woods will focus our efforts in a single landscape (see map below). We refer to this landscape as our My Sierra Woods-Tuolumne focus area (aka: MSW-T), where we plan to target our private forest landowner engagement strategy to achieve landscape-scale resilience.



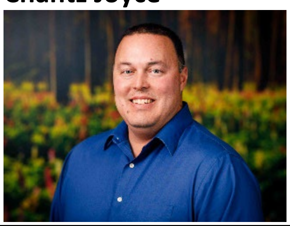
By March 2025 we plan to have completed fuels reduction treatments on 5,000 acres of non-industrial private forestland (NIPF) within the MSW-T footprint. To achieve that goal, we expect to connect ~300 landowners with registered professional foresters over the next few years.

Funding for My Sierra Woods-Tuolumne is provided by the California Department of Forestry and Fire Protection (CAL FIRE) Forest Health Program. Local partners include: California Tree Farm Program, Tuolumne County Resource Conservation District, Calaveras County Resource Conservation District, Tuolumne River Trust, Tuolumne Fire Safe Council, Natural Resource Conservation Service, Stanislaus National Forest, and Rural County Representatives of California.

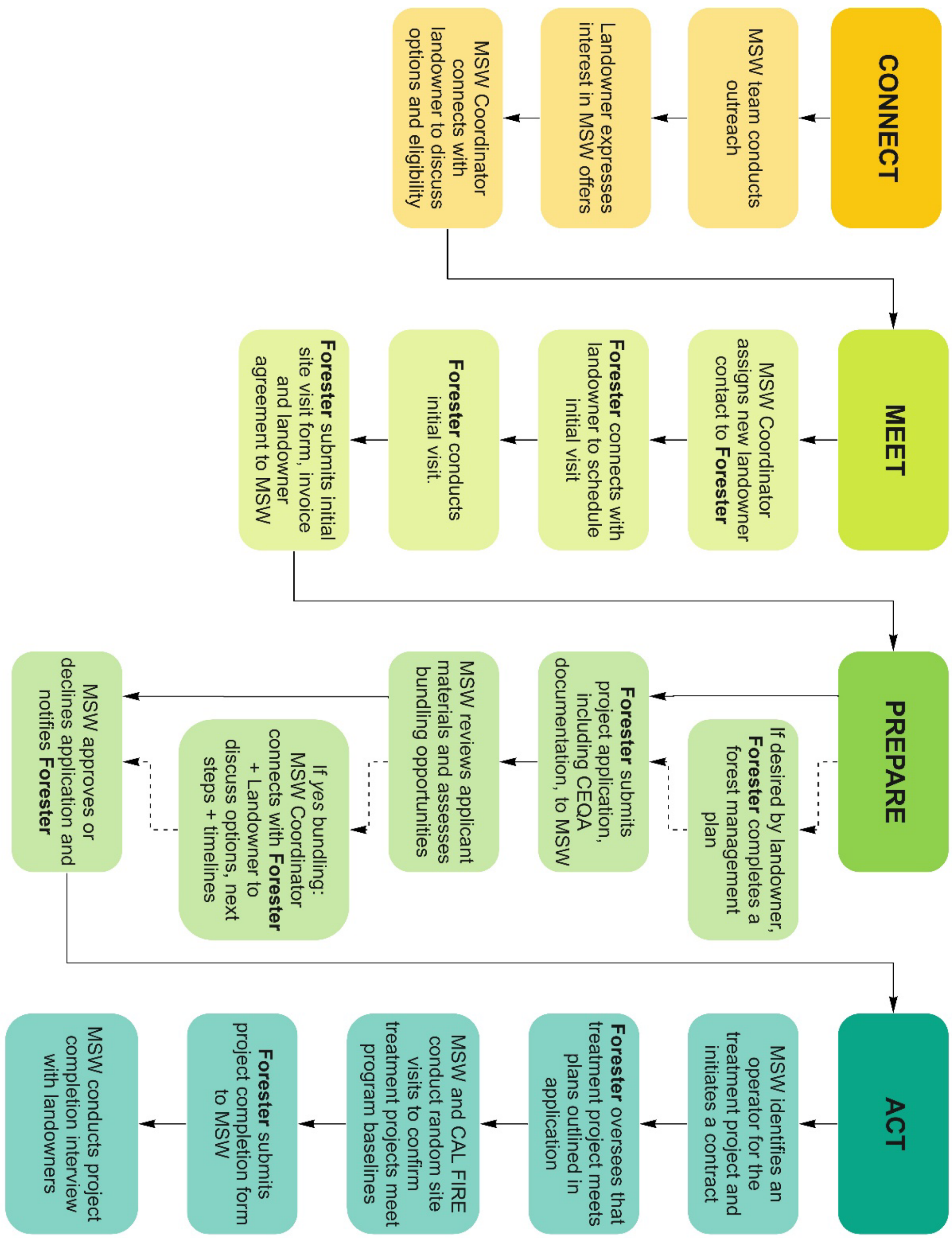
To learn more about My Sierra Woods-Tuolumne visit: www.mysierrawoods.org

Meet the Team

Many people and partners are involved in My Sierra Woods program. That said, the core team managing the day-to-day program components includes:

Name	Role	Contact Information
Jessi Baker 	*My Sierra Woods Coordinator* Local point of contact for program. Coordinates directly with landowners - building neighbor engagement, addressing questions / concerns about program, checking-in on project progress.	jbaker@forestfoundation.org (209) 432-9096 Based in Twain Harte, California.
Chantz Joyce 	*California Conservation Senior Manager* Manages program strategy, forester contracts and partner coordination.	cjoyce@forestfoundation.org (530) 524-9563 Based in Cottonwood, California.
Natalia Mushegian 	*Western Conservation Coordinator* Manages metrics tracking and database architecture, and provides GIS support.	nmushegian@forestfoundation.org (202) 765-3456 Based in Washington, DC.
Natalie Omundson 	*Western Conservation Senior Manager* Manages landowner engagement and team learning strategies.	nomundson@forestfoundation.org (202) 765-3454 Based in Fort Collins, Colorado.

Program Flow Chart



Guidance for Working with Landowners

The My Sierra Woods team recognizes that foresters play an important role in mitigating fire risk on private lands by providing landowners with the necessary technical assistance to plan and implement fuels reduction projects. As the landowner's key point of contact throughout the forest management project, we trust your technical expertise and ability to provide excellent service to landowners throughout the project.

The American Forest Foundation (AFF) is a national conservation organization that works with a broad coalition of partners to empower family forest owners to make a meaningful conservation impact around carbon sequestration, wildfire reduction, wildlife habitat, clean water, sustainable wood supplies and support for rural communities. AFF is an expert in private forest landowner engagement, with a long and respected history of developing innovative solutions and engaging partnerships that address our nation's most pressing conservation challenges.

A few tips we've learned over the years to improve forester-landowner relations and the probability of a landowner agreeing to fuels reduction treatment action:

<u>Tips for the initial consultation</u>

- **Start by listening**. Before you walk the property, spend some time connecting with the landowner – asking them questions about how they use the property, what future goals they have for their property, and what current needs or desires they have for their property. This question-first approach is crucial for building trust in you and your technical advice later in the forest management process.
- **Share your story.** At some point during your first visit, we recommend sharing the story about how you got into forestry and/or why this work matters to you. By sharing your motivations, you are reciprocating similar content that the landowner shared with you – which creates a trusting foundation for a successful relationship.
- **Tailor your suggestions.** During the property walk through, carefully tailor your treatment prescription options to address the landowner's specific concerns and motivations discussed earlier in the visit.
- **Clarify next steps.** Before you leave the property, set clear expectations with the landowner that – at a minimum – address the following questions:
    - What's the immediate next step – including who will be involved and when?
        - Answer will depend on where the initial visit discussion concludes, likely either (A) you'll reach back out to the landowner via preferred communication method in 2 weeks to confirm their interest in going forward with a project, or (B) you'll set up a follow-up meeting/call to continue the discussion about opportunities and address outstanding questions
    - Who can the landowner contact if they have follow-up questions?
        - Answer: you + MSW Coordinator, Jessi Baker (jbaker@forestfoundation.org; 209-432-9096)
    - How long will the forest management process take?
        - Answer: 6 months to 2 years, depending on project specifics and operator availability. The faster we can get started with this process, the better.

Tips for general communication with landowners

- **Clarify communication preferences early.** Create a list of options that feel comfortable for you – email, phone, in-person, and/or text – and share the list with your new landowner contact(s) to confirm their preferences. By agreeing to a preferred method of communication, you'll minimize your and the landowner's stress in feeling the need to manage multiple communication platforms/threads.
- **Clarify communication frequency.** At the beginning of your relationship with the landowner, we recommend walking through a rough timeline of what level of communication to expect throughout the forest management process – for example, "Early on, you can expect to hear from me on biweekly basis as we discuss your opportunities and design a project plan. After the planning and paperwork stages are complete, we'll expect a less frequent communication pattern – check-in calls/emails every month or so."
- **Manage response expectations.** Regardless of the communication preference you and the landowner select, we recommend that you follow a quick response + expectation setting practice. This doesn't mean that you need to respond immediately to a landowner email/call with a full answer. Instead, give a quick response confirming receipt and providing a rough timeline when you think you'll be able to address their questions/concerns.

Tips for convincing a landowner to conduct treatments:

- **Emphasize nonfinancial benefits in decision-making discussions.** We know that financial motivators (and barriers) are an important topic for landowners, but we also know that focusing exclusively on costs limits a landowner's perspective which can lead to lower-tier investment decisions. We recommend expanding the treatment options discussion to include and ideally prioritize nonfinancial factors. Further, because it can be difficult for landowners to conceptualize big, murky terms like "fire risk reduction" and "forest health restoration", we recommend using more tangible and specific terms to describe nonfinancial benefits. A few examples to consider: healthier trees, enhanced wildlife corridors, lower risk of crown fire, improved buffer between forest and structure (or house).
- **Recommend that they connect with a peer landowner.** The forest management process and decision-making criteria can be overwhelming for landowners, and sometimes the most helpful approach is to connect them with another landowner that has already successfully gone through the process. The My Sierra Woods team can help set your landowner up with a local peer. We have a small cadre of experienced landowners and Tree Farmers that are happy to meet with your landowner, either in person or virtually. Connect with our MSW Coordinator, Jessi Baker (jbaker@forestfoundation.org) to learn more.

Treatment Specifics

Our goal through the My Sierra Woods-Tuolumne program is to reduce the likelihood of unnaturally large and severe fire across the landscape by engaging NIPF landowners in fuels reduction (thinning) treatment projects.

We seek treatments that – at a minimum – meet NRCS California standards.

Here are links to the NRCS individual practice standard reference materials:

- Forest Stand Improvement (666)
  - 666 Practice Standards
  - Supplemental information + guidance
- Woody Residue Treatment (384)
  - 384 Practice Standards
- Fuel Break (383)
  - 383 Practice Specifications
- Prescribed Burning (338)
  - 338 Practice Standards
  - Practice Specifications

If your landowner is interested in burning options, connect directly with the local Tuolumne and Calaveras County Prescribed Burning Association (PBA): https://calpba.org/motherload-pba

MSW Financial Assistance
The My Sierra Woods team understands that high treatment costs are a significant barrier for private forest landowners interested in taking action, so we have developed a financial assistance strategy that will minimize that barrier as much as possible.

Baseline eligibility criteria for MSW financial assistance includes:

- Fuels reduction project located in MSW Tuolumne focus area
- Minimum of 10 acres of nonindustrial private forestland
- Project overseen by a Registered Professional Forester (RPF)
- CEQA compliance

Any landowner interested in MSW financial assistance to cover costs associated with a treatment project will need to work with an RPF to submit a project application (see "Paperwork" section of this manual for more detailed instruction).

To simplify paperwork and funding allocation processes, the MSW team will use the project application materials to negotiate direct contracts with operators. Foresters will be compensated for managing MSW project application processes and overseeing treatment projects but will not have to manage the financial assistance distribution to landowners or any operator invoices.

MSW financial assistance will be divided into three options for you and your landowner clients to consider.

	OPTION 1: Bundled Project	**OPTION 2: Large Project**	**OPTION 3: Small Project**
PROJECT REQUIREMENTS	Min 4 landowners *or* Min 150 acres	Min 20 acres	10-19 acres
TREATMENT COST COVERAGE	MSW covers 100%	MSW covers 90% Landowner(s) cover(s) 10%	MSW covers 75% Landowner(s) cover(s) 25%

<u>OPTION 1: Bundled Projects</u>
A key component of our MSW-T strategy is to prioritize multi-landowner project bundling opportunities. As a result of this strategy, we hope to maximize fuels reduction treatment efficacy on the landscape and realize cost-efficiencies from larger treatment project sizes. Treatment costs for bundled projects will be 100% covered by MSW financial assistance. The MSW team plans to invest the majority of the financial assistance funding budget into bundled projects.

Bundled project sideboards for foresters to consider:

- Bundled projects should include at least 4 landowners, or at least 150 acres of treatable forestland
    - NOTE: Individual landowner projects equal to or greater than 150 acres are ineligible for bundled project financial assistance, and instead should defer to Option #2
- Bundled parcels do not need to be perfectly adjacent; bundles can include landowner parcels located within 2 miles linear distance from one another so long as they retain similar proximity/access to infrastructure
- Treatment objectives across bundled parcels should be relatively consistent

The MSW team will coordinate with you and each landowner to determine if there are bundling opportunities for potential projects. The MSW Coordinator, Jessi Baker (jbaker@forestfoundation.org), will be your main point of contact in the bundling process.

OPTION 2: Large Individual Project

We understand that not every landowner will be willing or able to join a bundled project. For landowners with projects greater than 20 acres, MSW will cover 90% of treatment costs. Landowners will be responsible for covering 10% of treatment costs, payable directly to My Sierra Woods.

OPTION 3: Small Individual Project

For projects within the 10 to 19-acre range, we recommend discussing opportunities and benefits of creating a bundled project with nearby landowners. The MSW team is available to assist with the bundling conversation and neighbor recruitment process.

If a landowner is uninterested or unable to set up a bundled project, MSW will cover 75% of treatment costs for projects 10-19 acres in size. The landowner will be responsible for covering 10% of treatment costs, payable directly to My Sierra Woods.

Financial Aid for OPTION 2 and OPTION 3:

If a landowner is unable to cover the 10% requirement for OPTION 2 or the 25% for OPTION 3, they are welcome to submit a financial aid form to the MSW team – who will consider covering 100% of project treatment costs on a case-by-case basis, depending on landowner need and MSW financial assistance budget.

If any of your landowners fall into this category, please connect directly to the MSW Coordinator, Jessi Baker (jbaker@forestfoundation.org) to learn more about MSW financial aid paperwork and processes.

Paperwork (applications, agreements and invoices)

To monitor our My Sierra Woods program progress and satisfy our grant obligations, there are a few documents that foresters, landowners and operators will need to complete throughout the forest management process. All documents are available online and are linked to our program tracking database (which you may hear us refer to as "AirTable"). This section is designed to give you a feel for which forms you – as a contracted My Sierra Woods forester— will need to complete, as well as the forms that will be completed by other parties.

FORESTER FORMS

Forester Information Form (<2 min)
Link: https://airtable.com/shr3vx1NdpDbS2mqg
This is the first form that you will fill out for My Sierra Woods. It's a quick, one-time form to make sure we have your contact information on file, and to allow us to keep track of which landowners we've sent your way.

Initial Site Visit Form (5 min)
Link: https://airtable.com/shrnD8JhRPOLWuC53
Within one week of your first in-person, onsite visit with a new landowner (or group of landowners), you will need to submit this form. This form helps the MSW team clarify technical information about the parcel(s) and potential treatment options.

Forester Invoice Form (5 min)
Link: https://airtable.com/shrcruJI8BAoIinI7
Any time you complete a stage in the forest management journey (e.g., initial site visit, plan-writing / permitting paperwork, treatment project oversight), you will fill out this form to submit your invoice. You're welcome to use whatever invoice format you already use, but please indicate which landowners/projects were assisted and split out your time based on the type of assistance provided (see examples of acceptable invoice formats in Appendix section). Once you've submitted an invoice through this form, our team will review and send it to our finance office within a week. Our finance team processes and cuts checks weekly, so a check should be mailed to you within two weeks of submitting an invoice.

MSW Project Application (5-20 min)
Link: https://airtable.com/shrANeScfxTarRizN
Once landowners are ready to commit to a treatment project, you will submit this form so that we can initiate discussions with operators and clarify funding options. The form itself is quick but requires you to have a shapefile of the project boundary and CEQA information handy in order to complete it. The My Sierra Woods team will confirm application receipt within the week and will provide feedback on application materials within 1 month of submission. Feedback will include clarity on approval or need for more information, request to pause on project in order to assess bundling opportunities with nearby landowners, and/or clarification on next steps, roles and timelines.

Project Completion Certification (5-20 min)
Link: https://airtable.com/shrqQrvAUtFCTlLet
Once a project is completed, you will need to submit this form to confirm that the project has concluded and that the treatments meet specs outlined in the MSW application as well as NRCS practice standards. Note that after this form is submitted, the MSW team will connect directly with each landowner to confirm completion, discuss outstanding questions, and solicit feedback on the overall forest management process.

OTHER FORMS

Landowner Agreement
AFF will share PDF via email
Foresters will be in charge of introducing this form to landowners during the initial site visit. This is a consent form to manage landowner expectations about My Sierra Woods data collection and uses. Landowners will need to complete this form early in the forest management process – sometime between the initial site visit and the MSW Financial Assistance application. The My Sierra Woods team will be available in case any questions or concerns arise.

MSW Payment Request form (20 min)
Link: https://airtable.com/shrE6pgdUixQxx9k1
This is the form through which operators receive payment for treatment, under the rate approved in the landowners' financial assistance application. While the information needed to calculate the payment is basic – acres treated in the treatment period for which the form is submitted, and per-acre rate – we also ask some more detailed questions on the finances of the project. This detailed breakdown is required, but it's okay if it includes estimates. We are collecting this information to better advocate for financial assistance for landowners in the future.

Appendix

Examples of Acceptable Invoice Formats

Work Detail - 7/1/2021 - 8/31/2021

[redacted]

Date	Landowner	Landowner Address	Hours Worked	Employee	Rate	Total	Description of Work (Includes drive time)
7/28/2021	[redacted]	[redacted]	2	AE (RPF)	$100	$200	Site visit to [redacted] to GPS work completed
7/29/2021	[redacted]	[redacted]	0.5	AE (RPF)	$100	$50	Coordination with [redacted] re: start of work
7/30/2021	[redacted], [redacted]	[redacted] and [redacted]	1.5	AE (RPF)	$100	$150	Site visit to [redacted] property to double check flagging prior to start of work, send W9 to [redacted]
8/2/2021	[redacted]	[redacted]	2	AE (RPF)	$100	$200	Pre-work meeting with contractor to review specs, pre-work bird survey
8/3/2021	[redacted], [redacted]	[redacted] and [redacted]	3	AE (RPF)	$100	$300	Check in on work progress at [redacted], take contractors to see [redacted] property to provide quote
8/4/2021	[redacted]	[redacted]	2	AE (RPF)	$100	$200	Check work progress
8/4/2021			2	CC (forestry technician)	$60	$120	Check work progress
8/6/2021	[redacted]	[redacted]	1.25	AE (RPF)	$100	$125	Final check-in at [redacted] contractor's last day, check in with [redacted] re: satisfaction w/ work
8/6/2021	[redacted]	[redacted]	1	CC (forestry technician)	$60	$60	Final check-in of work progress
		TOTAL HOURS	15.25		July and Aug total	$1,405	
		TOTAL MILEAGE	see "Mileage" sheet			$ 160.16	
					INVOICE TOTAL	**$1,565**	

[redacted]

Invoice

Date	Invoice #
[redacted]	

Bill To
American Forest Foundation PO Box 17 Niwot, CO 80544

P.O. No.	Project
	My Sierra Woods

Date	Item	Quantity	Description	Rate	Amount
4/19/2021	Consulting RPF	2	[redacted] Consultation	65.00	130.00
5/7/2021	Forest Technician	3.75	Mapping EFRP projects for [redacted]	42.50	159.38

Total $289.38