



HERITAGE

Habitat & Forestry

Sustainable & Comprehensive
Forest Management

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Heritage Habitat & Forestry

Forestry Services Packet

A complete overview of our forestry & natural resource services

Prepared by:

Anthony F. Pappas, CF

Owner, Lead Consultant



All links are active & will direct you to the appropriate webpage, feel free to click through to learn more

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About Us

Mission Statement

To wisely manage, conserve, and utilize our shared natural resources for the benefit of not only economic returns but also to the perpetual existence of our forests and the life within them using scientifically based and ecologically-sound forest and habitat management principles.

Who We Are

Owner Anthony F. Pappas has years of experience managing public land for the benefit of both wildlife and the eventual realization of economic returns on timber as well as working for a timber consulting company focused on ecologically-sound timber production.

From the prairies of North Dakota down to the hills of northern Alabama and out to the Ozarks of Arkansas, Anthony has experience in a multitude of forest types and habitat diversities. Taking this first-hand knowledge of “wildlife forestry,” Anthony has built his Ohio-based company around managing forests for multiple uses.

We have forestry experience in over a dozen states and counting, from upstate New York, down to Georgia, out to Kansas, and everywhere in between!

Why Choose Us

Forest management, for us, transcends timber production and income. It involves making conscientious decisions to enhance the long-term sustainability of natural resources. While timber management is crucial, we equally prioritize the management of pollinator habitat, riparian zones, and other non-timber forest resources.



Credentials

Anthony F. Pappas, Owner

Certified Forester

Registered Forester, Arkansas & West Virginia

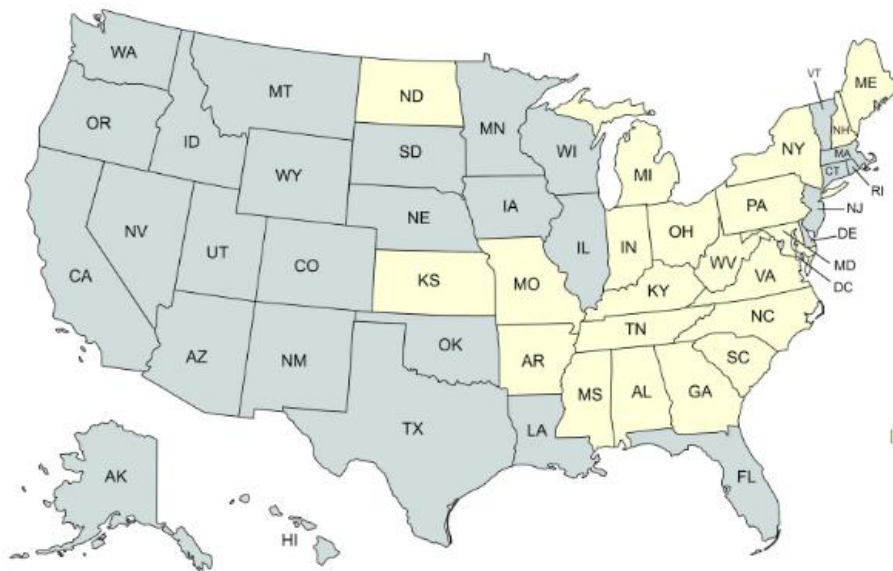
NRCS Technical Services Provider (TSP)

Certain states require such registration for forestry professionals, Ohio & Pennsylvania do not, therefore no license is required to practice forestry in those states.

Administered by the Society of American Foresters, the [Certified Forester program](#) ensures qualified foresters meet rigorous education & experience requirements, while adhering to ethical standards of practice in the profession.

Administered by the Natural Resources Conservation Service (NRCS), [technical service providers](#) are qualified entities able to offer conservation services and practices to landowners.

Experience



Created with mapbox.com




Memberships



Better Business Bureau

Accredited business – [our profile](#)

Office Locations

 <p>Ohio Centerburg, OH</p>	 <p>Pennsylvania Clarington, PA</p>	 <p>West Virginia New Milton, WV</p>
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Learn more at heritagehabitatco.com/about



Figure 1. Click to download our free booklet on forest management!

Forest Carbon Consulting

Introduction

Heritage Habitat & Forestry offers expert forest carbon consulting to landowners participating in carbon programs. Our services guide landowners through available programs, contract lengths, and potential income. With over 100 consultations across various states, including Ohio, Maryland, Pennsylvania, and West Virginia, we provide valuable insights and maintain direct relationships with forest carbon companies.

Why Heritage Habitat & Forestry

To-date, we have conducted over 100 forest carbon consultation and project advisements in various states, including Ohio, Maryland, Pennsylvania, and West Virginia. We have a direct professional relationship with several forest carbon companies, and are able to communicate efficiently with program administrators to answer any questions, provide feedback, etc.

Our service includes a forestry consultation site visit whereas we walk through and discuss your property, as well as your goals for your land and what you strive to accomplish. Our experience, professionalism, and personability with forest carbon and landowner consultations make us an exceptional choice to provide your forest carbon consulting needs.

Types of Forest Carbon Programs

We provide consultation and advisement for types of forest carbon programs: Improved Forest Management, Avoided Conversion, and Afforestation/Reforestation. The type of program best suited for your property will be evaluated during our consultation process. We have several carbon companies providing one or the other type of program to private landowners.

Property Visit

For those program(s) that require an on-site assessment, Heritage Habitat will visit your property on your schedule, preferably to meet you on property to conduct a walk through in addition to the forest inventory required for the program you have applied for.

Large Landholdings

For properties over 5,000 acres, in addition to the previously mentioned programs, there are carbon project developers who may develop and individualized forest carbon program. Research in to these programs is on an individual case-by-case basis. If your property is greater than 5,000 acres reach out to us specifically to learn more about individual carbon project development.

EARN INCOME FROM FOREST CARBON CREDITS

Forest Carbon Credits.
Timber Sales.
Land Tax Deductions.

LANDOWNERS...

- Get paid to grow timber
- Average payments from \$10/ac/year and up
- Consult landowners through various programs

**Know your options.
Speak with a professional
forester.**

[LEARN MORE](#)

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Sustainable & Comprehensive Forest Management



Conclusion

Heritage Habitat & Forestry is on the cutting edge of forest landowner carbon programs. We can actively consult you through a variety of programs, define confusing terminology and concepts, and streamline the assessment process in order to provide you with the fairest and most comprehensive forest carbon quotes available today! Feel free to reach out with additional questions, comments, or to get started!

Landowner Forest Carbon Project Analysis						
Name		Approx. Merchantable Volume		Board Feet		
Date				BF/ac		
Acres				Total		
State				\$/ac		
Program				\$/ac/yr		
Term Length				\$/BF		
		Comparable Offers		Your Offer	% Difference	
				\$/ac		
				\$/ac/yr		
			\$/BF			
Notes						
Bottom line:						
<i>Prepared by: Anthony F. Pappas, CF © 2022, Heritage Habitat & Forestry, LLC</i>						

An example of a landowner carbon analysis.

Learn more at heritagehabitatco.com/forest-carbon-consulting

Forest Improvement Practices

Introduction

Enhance the quality of your woods with our forest improvement practices, including non-timber harvesting methods. From chainsaw treatments to herbicide applications, we prioritize sustainable practices to improve forest health. Typically, this work is contracted by Heritage Habitat to other vendors.

Chainsaw Treatments

Examples include edge feathering, hinge cutting, midstory removal, crop-tree release, etc. Our meticulous approach improves sunlight availability and maintains residual tree quality.

Herbicide Application

Foliar, hack-and-squirt, and cut stump treatments are available to target specific areas and enhance overall forest health.

Our Process

We will identify where on the property the work is needed, in what capacity, and at the appropriate time of year (typically through one of our Forest Management Plans).

We have a list of contractors available to complete the work, with Requests for Quotes being sent to each dependent upon the work to be done.

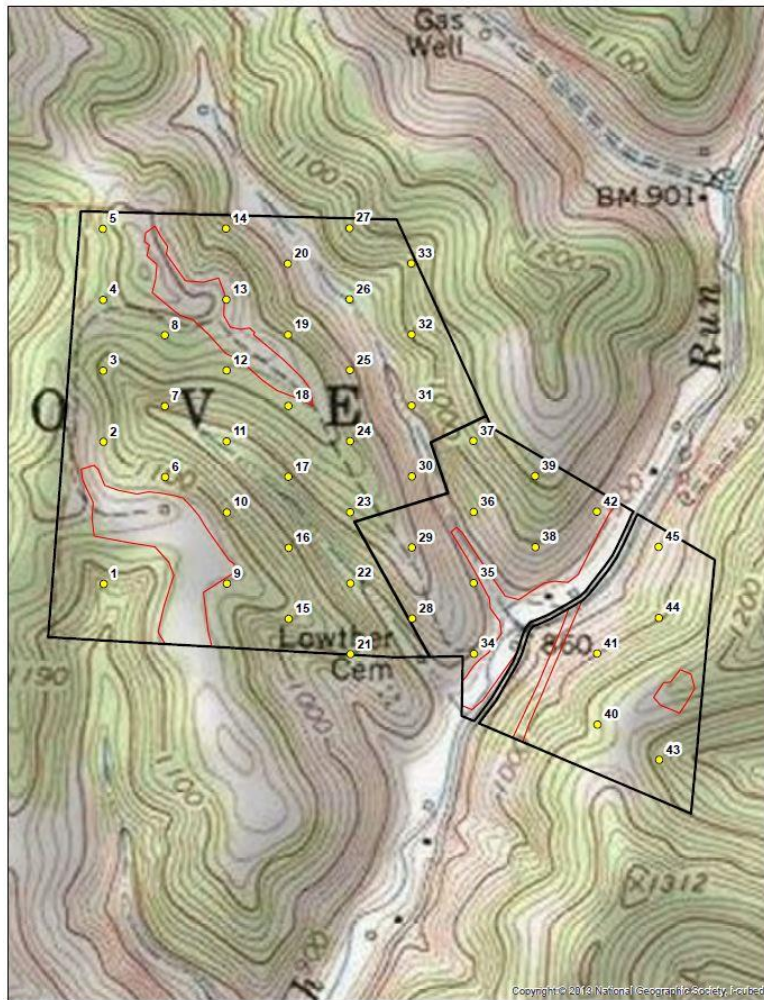
We can then monitor the project from beginning to end, ensuring compliance through our Project Oversight service.

Identify areas needing improvement, select appropriate treatments, and coordinate with qualified vendors through our network. We monitor projects from initiation to completion, ensuring compliance with sustainable practices.

Timber Inventory & Valuation

Introduction

Timber appraisals are instrumental in facilitating nuanced decision-making within the forestry and natural resource management domain. This meticulous valuation process serves diverse functions, catering to the informational needs of landowners, investors, and resource managers. The comprehensive utility of timber appraisals encompasses the following detailed and professional applications:



An example of a landowner timber appraisal sampling layout.

1. Financial Decision-Making:

- **Sale and Purchase Transactions:** Timber appraisals function as indispensable tools for discerning the intrinsic value of timber assets, playing a pivotal role in negotiations during the acquisition or divestiture of forested land or timber rights.
- **Loan Collateral:** In financial transactions, these appraisals are employed to establish the value of timber resources, enabling landowners to leverage their timber assets as collateral for loans, financing endeavors, or refinancing initiatives.

2. Forest Management Planning:

- **Harvest Planning:** Timber appraisals intricately inform the strategic planning and scheduling of timber harvests by providing detailed estimates of volume, value, and maturity of timber resources.
- **Rotation Age Determination:** Through systematic analysis, timber appraisals aid in determining the optimal rotation age for harvesting timber, thereby maximizing economic returns while adhering to sustainable forestry practices.

3. Taxation and Estate Planning:

- **Property Tax Assessments:** Timber appraisals contribute substantively to the accurate assessment of property taxes, serving as the foundational basis for calculating the taxable value of forested land.
- **Estate Planning:** In the context of estate planning, landowners utilize timber appraisals to meticulously gauge the value of their timber assets, ensuring meticulous financial planning.

4. Insurance Purposes:

- **Risk Management:** The in-depth insights provided by timber appraisals are crucial for assessing and managing risks associated with potential timber loss due to natural disasters, fire, pests, or other unforeseen events.
- **Insurance Claims:** These appraisals function as meticulous documentation supporting insurance claims in instances of timber damage or loss, providing a robust foundation for claim settlements.

5. Resource Conservation and Environmental Stewardship:

- **Biodiversity Conservation:** Timber appraisals incorporate considerations related to biodiversity and habitat preservation, aligning forest management practices with sustainable principles.

- **Environmental Impact Assessment:** The appraisals contribute to a comprehensive assessment of the environmental impact associated with timber harvesting, ensuring compliance with stringent regulatory standards and fostering responsible forestry practices.

6. Investment Analysis:

- **Timberland Investment:** In the realm of investment analysis, timber appraisals serve as indispensable tools for evaluating the potential returns on investment in timberland, taking into account growth rates, market dynamics, and management strategies.

7. Land Use Planning:

- **Zoning and Development:** Timber appraisals play a pivotal role in land use planning by offering nuanced insights into the economic value of timber resources within the context of potential development or conservation initiatives.

8. Certification and Compliance:

- **Forest Certification Programs:** Timber appraisals form an integral component of the stringent requirements for forest certification programs, attesting to adherence to sustainable and responsible forestry practices.

Forest Management Plans

Introduction

Heritage Habitat offers state-approved forest management plans that qualify landowners for tax benefits. Explore federal and state forest landowner programs, including Ohio's Forest Tax Law and Current Agricultural Use Value, and West Virginia's Managed Timberland Program and Stewardship Program.

Federal & State Forest Landowner Programs

Ohio - [Ohio Forest Tax Law](#)

OFTL provides a 50% reduction of property taxes on qualifying forested acreage.

Minimum qualifications include: 10 acres of forestland, marked boundaries, & approved forest management plan.

Source: Ohio Dept. of Natural Resources, Ohio Forest Tax Law

Ohio - [Current Agricultural Use Value](#)

CAUV provides tax savings to landowners by assessing forested property as commercial agriculture rather than its "highest and best" potential use. Results in typically >50% reduction of taxes on qualifying acres.

Minimum qualifications include: 10 acres of forestland, marked boundaries, & approved forest management plan.

Source: Ohio Dept. of Taxation, Current Agricultural Use Value

West Virginia - Managed Timberland Program

MTP provides significant tax incentives for forest landowners who practice sustainable forestry on their property.

Minimum qualifications include: 10 acres of forestland, halt on timber harvest until plan approved, & approved forest management plan.

Source: West Virginia Div. of Forestry, Management Assistance

West Virginia – Stewardship Program

West Virginia also offers a state cost-share program to assist landowners in paying for a forest management plan to be developed on their property.

Nationwide - Environmental Quality Incentives Program

EQIP is a program of the Natural Resources Conservation Service, under the USDA, that provides financial & technical assistance to landowners to address natural resources concerns on their property. Funding may be available to qualified landowners for practices such as: invasive species removal, forest stand improvement, & more.

Source: USDA, Environmental Quality Incentives Program

Our Management Plan Styles

Choose from three styles—Basic, Habitat, and Combination—that cater to different goals, including tax savings, wildlife habitat enhancement, and comprehensive forest management.



WE WRITE **CAUV & OFTL**
FOREST MANAGEMENT PLANS!
SAVE AT LEAST 50% on your wooded acres taxes!

330-419-1769

Style: Basic Forest Management

This management plan style is geared towards the landowner who is primarily interested in saving tax dollars on the forested acreage.

This plan incorporates scientifically backed and ecologically-sound forest management principles and techniques in order to grow, maintain, and reproduce commercially viable timber species while providing periodic income for the landowner.

Includes:

- Landowner Goals & Objectives
- Long Term Forest Sustainability & Health Priority
- Stand Maps
- Soil Map
- Treatment Schedule
- Treatment Map
- Forest Stand Descriptions & Analysis
- Forest Resources Description

Style: Forest Wildlife Habitat Management

This management plan style's priority is both the creation, maintenance, and enhancement of wildlife habitat throughout your property as the primary priority as well as the sustainable growth and eventual harvest of commercial timber products as a secondary priority.

This style incorporates scientifically backed and ecologically-sound habitat management principles and techniques in order to promote and reproduce commercially viable timber species while also prioritizing wildlife habitat enhancement practices such as: creation of bedding thickets, edge feathering, vertical and horizontal forest diversity, promotion of herbaceous species, etc.

Includes:

- Landowner Goals & Objectives
- Long Term Forest Sustainability & Health Priority
- Stand Maps
- Soil Map
- Treatment Schedule
- Treatment Map
- Forest Stand Descriptions & Analysis
- Forest Resources Description
- Habitat Conditions & Analysis
- Openlands Stand Descriptions & Analysis

Style: Combination Forest Management

This plan is exactly as the heading implies! You receive both the wildlife habitat management recommendations as well as a timber appraisal and treatment recommendations as described above. This is Heritage Habitat & Forestry's signature product!

Data Delivery

For all our management plan styles, the landowner will receive the follow data package:

- Your personalized, property-specific management plan with recommended treatments and practices to improve your property based upon your goals & objectives
- A soil report of your property
- Any maps used to create your plan
- All digital GIS files used to create your maps
- Inventory data, both raw & refined in Excel worksheets
- Any relevant landowner fact sheets provided by university extension offices, USDA, & others

	Basic	Habitat	Combo
Landowner Goals & Objectives	X	X	X
Qualifies for WV Stewardship, NRCS cost-share funding		X	X
Long-term Forest Sustainability & Health Priority	X	X	X
Stand Maps	X	X	X
Soil Map	X	X	X
Treatment Schedule	X	X	X
Treatment Map	X	X	X
Forest Stand Descriptions & Analysis	X	X	X
Forest Resources Description	X	X	X
All field data & georeferenced maps including in your plan	X	X	X
University Extension factsheets regarding specific forestry terms	X	X	X
Unlimited over-the-phone assistance included	X	X	X
One-time virtual meeting to review management plan			X
Habitat Conditions & Analysis		X	X
Openlands Stand Descriptions & Analysis		X	X
Timber Valuation			X
Stand & Stock Tables			X
Diameter Distribution			X
Forest Productivity Map			X
Statistical Forest Inventory Information			X

NRCS EQIP plans are not included in this table, as those plans have their own set of requirements.

Step-by-step Guide

Step 1: Choose Your Management Plan Style

- Heritage Habitat offers three distinct management plan styles – Basic, Wildlife Habitat, and Combination.
- Depending upon the style you chose, our plans are geared specifically to that style.
- It is up to you, the landowner, to decide which style you want your management plan prepared in.

Step 2: Schedule a Site Visit

- This will consist of Heritage Habitat meeting you on your property to walk your land and discuss with you what your goals and objectives are for your property. Do you hunt? Do you have a desire to tap maple syrup? Have you cut firewood in certain areas or planted trees somewhere? These types of questions will be asked in order to get a better understanding of your goals for your property.
- Typically, depending on acreage, this takes a couple hours.
- This is the only field step that requires your direct involvement. Unless, of course, you wish to skip this walk with us!

Step 3: Forest Inventory

- This step is crucial for the development of your management plan and not all forestry companies offer this service for the development of landowner management plans.
- A forest inventory consists of Heritage Habitat collecting data on numerous GPS sample points plotted on your property. Once on plot, trees are determined to be in/out (counted or not counted) for the sample and the following data is collected: tree species, number of trees, merchantability of tree, diameter of tree, and other related points dependent upon which style plan you chose.
- This data is then worked up in our office to provide us and you, the landowner, with accurate and concise information on what is actually growing on your property.
- With this data, we can determine the following that are relevant to the style of management plan you chose: volume of timber, value of timber, species composition, average diameter, forest density, etc.

Step 4: Data Work-Up

- Heritage Habitat will then use information from the site visit and the forest inventory to write your management plan that is geared towards your goals and objectives
- All data, maps, and related documents relevant to your plan will be provided to you in a compressed zip folder digitally. Again, not all forestry companies provide the landowner with this wealth of information.
- These files include:
 - Your personalized, property-specific management plan with recommended treatments and practices to improve your property based upon your goals and objectives
 - A soil report of your property
 - Any maps used to create your plan

- All digital GIS files used to create your maps
- Inventory data, both raw and refined in Excel worksheets
- Any relevant landowner fact sheets provided by the NRCS and OSU Extension, among others

Step 5: Landowner Plan Submission

- The final step is for you, the landowner, to submit your new management plan to the appropriate agency for whose program you are applying for.
- Heritage Habitat will aid you the best we can in this process.

Conclusion

All recommended management practices are based on proven science and are only applied if they meet the following criteria: 1) ecologically and environmentally sound and will do no harm to the sustainability of the natural resource, 2) fits the landowner's goals and objectives, and 3) is realistically able to be accomplished given the landowner's constraints

The health and sustainability of natural resources is Heritage Habitat & Forestry's primary focus.

Geospatial & Mapping Solutions

Introduction

Using today's advanced mapping programs, including Geographic Information Systems (GIS), we can create comprehensive maps to meet your goals.

Here are some key features and functionalities that ArcGIS Pro provides for mapping projects:

1. Geospatial Analysis:

- ArcGIS Pro allows for complex geospatial analysis, enabling you to analyze and derive meaningful insights from spatial data.
- You can perform overlay analysis, proximity analysis, terrain analysis, and more to understand relationships and patterns in your data.

2. Data Integration:

- Import and integrate various types of data, including satellite imagery, GPS data, LiDAR data, and more.
- Combine different datasets to create a comprehensive view of your project area.

3. Digitizing and Editing:

- Digitize and edit features directly on the map, allowing you to create accurate representations of physical features and infrastructure.

4. 3D Mapping:

- ArcGIS Pro supports 3D mapping, allowing you to visualize your project area in three dimensions. This is particularly useful for projects involving elevation or complex terrain.

5. Map Layouts and Printing:

- Design map layouts with titles, legends, and other elements for professional presentation.
- Print high-quality maps or export them in various formats for sharing or inclusion in reports.

6. Database Connectivity:

- Connect to databases to manage and analyze large datasets efficiently.

7. **Web Mapping:**

- Share your maps and data online using ArcGIS Online or other web mapping platforms.

8. **Customization and Automation:**

- ArcGIS Pro allows customization through Python scripting, enabling you to automate repetitive tasks or create specialized tools.

9. **Mobile Integration:**

- Collect and update data in the field using mobile devices, and synchronize the changes back to the main GIS database.

10. **Spatial Reference Systems:**

- Manage different coordinate systems and projections to ensure accurate representation of spatial data.

By leveraging these capabilities, ArcGIS Pro provides a powerful platform for creating detailed and accurate digital maps for various projects, contributing to effective decision-making and planning processes.

Project Planning & Oversight

Introduction

We can prepare, bid, and monitor forestry and natural resource contracts conducted on your land. Herbicide work, chainsaw treatments, etc., can be bid on across our qualified vendor lists, offers prepared and presented to landowner, and contract execution and monitoring all provided at an hourly rate.

Benefits of Project Oversight

The landowner saves time and money by hiring Heritage Habitat to administer various forestry and natural resources contracts on their behalf.

Can be helpful for a variety of reasons:

- Contract preparation
- Open bidding to our list of qualified vendors
- Bids presented to landowner with you having final authority to determine which contract is right for you
- Contract monitoring over the term of the agreement to ensure quality and compliance

Property Evaluations

Introduction

Interested in a 3rd-party opinion on a property you may be interested in purchasing?

Engage in an informed decision-making process by seeking a comprehensive 3rd-party assessment for a property under consideration for purchase. Our specialized service entails a meticulous on-site walk-through, culminating in a detailed 1- to 2-page report. This document serves to provide a nuanced analysis of both timber and wildlife habitat potential identified during the property assessment.

Purposes of Property Evaluations:

1. Cost-Effective Alternative to Forest Management Plans:

- Our property evaluation service offers a cost-effective alternative to comprehensive forest management plans. While not qualifying for tax-savings programs or EQIP applications, it presents an economical solution for those seeking valuable insights without the expansive scope of a full-scale management plan.

2. Versatile Utility for Various Objectives:

- **On-Site Property Evaluation:** Ideal for individuals considering the acquisition of a property, our service facilitates a thorough on-site evaluation, providing valuable insights into the property's characteristics and potential.
- **Assessment of Wildlife Habitat and Timber Production Potential:** Delve into the capability of your property to foster high-quality wildlife habitat and commercial timber production. Our assessments offer a detailed understanding of the property's capacity for these crucial aspects.
- **Validation through 3rd-Party Evaluation:** Receive an impartial evaluation from a 3rd-party source, providing a credible assessment of claims made by other parties regarding the habitat and timber quality on a specific property.

Make informed decisions regarding property acquisition or management by leveraging our professional property evaluation service. Our comprehensive reports, derived from on-site assessments, aim to empower clients with valuable insights into the potential of a property's natural resources.

Timber Sale Administration

Introduction

Interested in selling timber? We can administer your sale from beginning to end. Our administration includes marking every tree to be cut, advertising the sale, & monitoring to ensure sedimentation & erosion law compliance.

When you hire Heritage Habitat & Forestry to administer your timber sale, you can rest assured knowing that we place the upmost value on sustainable forestry.

When marking your timber (see Step 2) we will never recommend or condone the removal of all high value trees...this is called "high grading". High grading can be defined simply as taking the best and leaving the rest. This method of timber harvest is unsustainable, unscientific, and unethical.

Our marking methods ensure a sustained approach to the forest as a whole. We may only harvest a handful of the "best" trees but remove a majority of the "junk" trees.

If you've been approached by a timber buyer in the past, keep in mind that many will be offering you a price based on a high grade removal...the profit may sound enticing, but the damage caused to your forest as a whole will take several decades and active management to correct!

The Process

Step 1: Marking Your Timber

- Timber marking consists of Heritage Habitat painting each tree individually that is to be cut and sold across your entire timber sale area as well as flagging your timber sale boundary.
- While painting each tree, we collect more data (marking tally) such as the species of the tree, tree diameter, and merchantable height.
- Using this additional data, we can calculate precisely how much volume is being removed from the property, as well as project what the residual forest species composition will look like post-harvest.
- This "marking tally" will provide us with an estimate on the timber value that is to be sold. Using this number, you can determine which bid price to accept (if any at all).

Step 2: Advertise Your Timber

- At this point, Heritage Habitat will prepare a bid packet for your timber sale, which includes:
 - Timber sale inventory of marked timber
 - Map of your property, timber sale boundary, purchaser access, and log deck locations
 - Directions to and road map showing location of timber sale area
 - Sealed-bid schedule setting time and date deadline for receipt of sealed bids; time and location of private bid opening of all timely bids by HHF.

- Description of sealed-bid procedure:
 - Date and location of signing of timber sale contract
 - Forms of acceptable bidding
 - Forms of acceptable payment
 - Time and place of signing of landowner's contract with purchaser
 - Purchaser's payment schedule
- A sealed bid packet will then be mailed to Heritage Habitat's list of potential purchasers (as well as any purchasers the landowner may have in mind), and a date will be set to open the bids.
- The landowner always retains the right of refusal of any and all bids for any reason if you are not satisfied with the bid prices.
- Heritage Habitat will conduct tours of the timber sale area to any interested purchasers.

Step 3: Selling Your Timber

- Once the landowner has accepted the bid price of one particular purchaser, Heritage Habitat will furnish a three-party contract between landowner, purchaser, and Heritage Habitat. We will never sign a timber sale contract on behalf of the landowner. In this contract, Heritage Habitat and the landowner will detail precisely how the landowner wants the timber sale to be conducted, what the end results will look like, etc.
- Heritage Habitat will then advise the landowner on the harvesting schedule and operations, as needed.
- Heritage Habitat will conduct periodic unscheduled inspections of the logging operation to ensure the purchaser is adhering to all specifications outlined in the timber sale contract.

Step 4: Timber Sale Close-out

- Lastly, Heritage Habitat will conduct a thorough walk-through of the timber sale area to ensure all contractual obligations of the purchaser have been met.

Conclusion

Heritage Habitat does not and will not recommend "high-grading" timber harvests. This is a logging style that "takes the best, leaves the rest". This method is not sustainable, not ecologically sound, nor scientifically backed.

In all timber sales that Heritage Habitat marks, we select each "cut" and "leave" tree deliberately with the goal of long-term forest sustainability that is both scientifically backed and ecologically sound. A timber sale is not only the removal of the standing timber on the property, but also the "grooming" of the next generation of forest.

Heritage Habitat will not make any financial decisions on behalf of the landowner without prior approval. All major timber sale-related decisions will involve landowner consent. The landowner can be as involved as he/she wants to. Heritage Habitat will make all appropriate accommodations to ensure the easiest timber sale process from beginning to end.

GENERATE INCOME FROM WOODLAND

There are multiple ways to both
save & generate income off
of wooded properties.

Know your options.

**Forest Carbon Credits.
Timber Sales.
Land Tax Deductions.**

LEARN MORE

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Visit our website to view a detailed list of services & descriptions.
heritagehabitatco.com

- Forest carbon consulting
- Forest improvement practices
- Timber inventory & appraisal
- Forest management plans
- Geospatial & mapping solutions
- Project planning & oversight
- Property evaluations
- Timber sale administration



Please fill out information below for your parcel(s):

Name: _____

Name(s) on Deed(s): _____

Email: _____ Phone number: _____

Mailing address (city, state, zip): _____

Property address (if available): _____

Parcel #s, County, State: _____

Approximate total acreage: _____ How did you hear about us? _____

Would you like to schedule a free forest carbon consultation (if available in your area)? Yes / No

Interested service(s), can select more than 1:

Forest Carbon Consulting Timber Appraisal Forest Management Plan

Mapping Solutions Project Oversight Property Evaluation Timber Sale Admin.

If you are interested in a Forest Management Plan, which program? Circle option below:

OH programs: CAUV -or- Forest Tax Law

Federal Cost-Share: EQIP CPA106

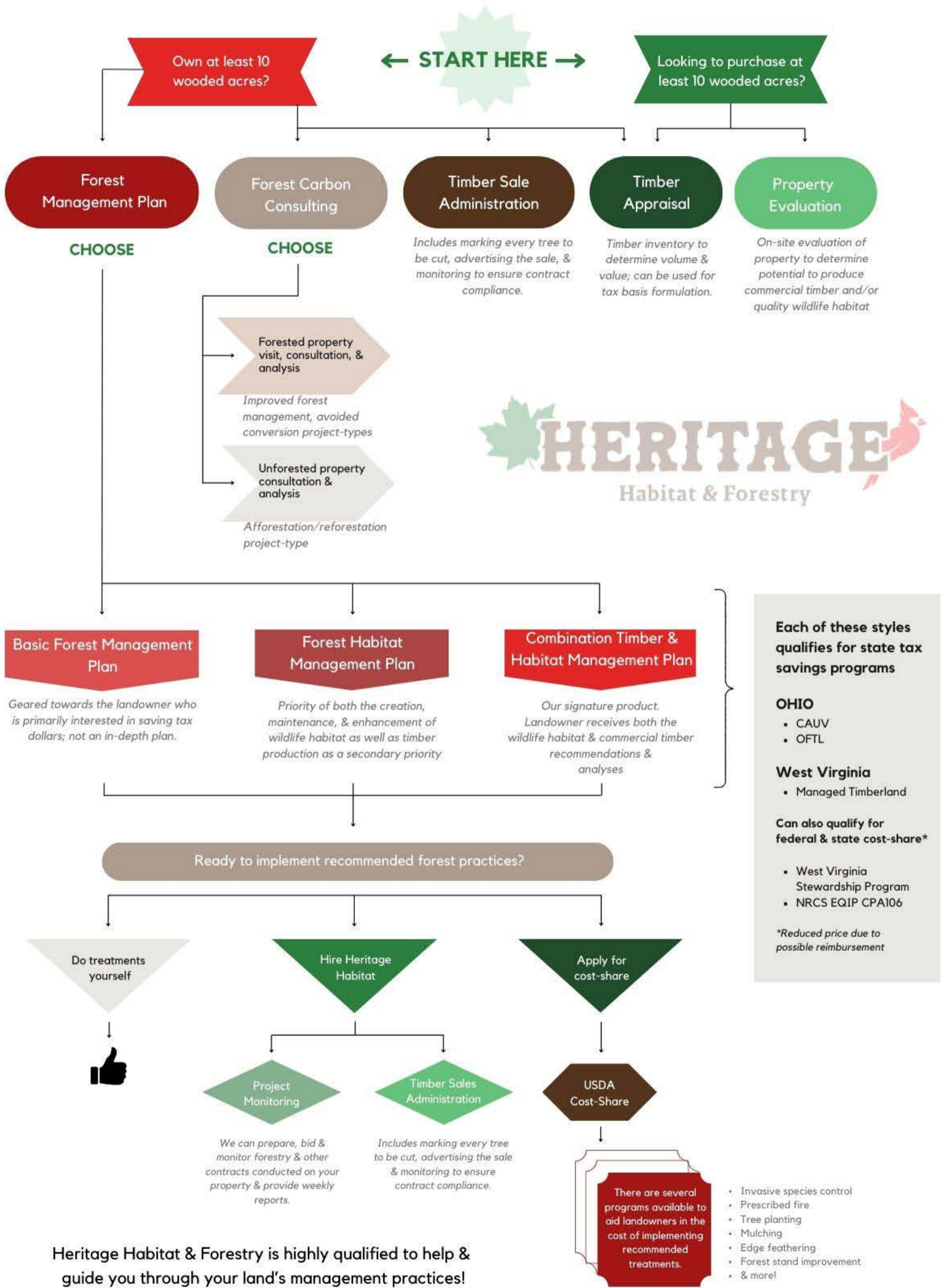
WV Programs: Managed Timberland -or- Stewardship

Other

Notes/Concerns:

Please email completed form to HeritageHabitatCo@gmail.com

How Can **Habitat & Forestry Management** Help You?



Questions? Reach out today

(330) 419-1769 | HeritageHabitatCo@gmail.com

HeritageHabitatCo.com

Environmental Quality Incentives Program

Natural Resources Conservation Service



USDA's Natural Resources Conservation Service offers voluntary Farm Bill programs that benefit both agricultural producers and the environment.

Overview

The Environmental Quality Incentives Program (EQIP) provides technical and financial assistance to producers to address natural resource concerns and deliver environmental benefits such as improved water and air quality, conserved ground and surface water, increased soil health and reduced soil erosion and sedimentation, improved or created wildlife habitat, and mitigation against drought and increasing weather volatility.

Benefits

Through EQIP, NRCS provides agricultural producers with one-on-one help and financial assistance to plan and implement improvements, or what NRCS calls conservation practices. Together, NRCS and producers invest in solutions that conserve natural resources for the future while improving agricultural operations.

Program at a Glance

NRCS will help you develop a conservation plan that meets your goals and vision. This plan becomes your roadmap for selecting the right conservation practices for your land. NRCS offers about 200 unique practices designed for working farms, ranches, and forests.

NRCS financial assistance can cover part of the costs of implementing conservation practices.

Who is Eligible?

Farmers, ranchers, and forest landowners who own or rent agricultural land are eligible. EQIP assistance can be used on all types of agricultural operations, including:

- Conventional and organic
- Specialty crops and commodity crops
- Forestry and wildlife
- Historically underserved farmers*
- Livestock operations

*Increased and advance payments available for historically underserved producers (beginning, limited resource, socially disadvantaged, and military veterans.)

How to Apply

Apply at your local USDA Service Center, which you can find at farmers.gov/service-locator.

Applications for EQIP financial assistance are accepted throughout the year. Specific state deadlines are set for ranking and funding. If your application is ranked and selected, you will enter into a contract with NRCS to receive financial assistance for the cost of implementing conservation practices. Payment rates for conservation practices are reviewed and set each fiscal year.

More Information

For more information, visit nrcs.usda.gov/farbill or farmers.gov.

Find your local USDA Service Center at farmers.gov/service-locator.

What's New in the 2018 Farm Bill

Adds potential resource concerns related to beneficial cost-effective operation changes.

Raises cap for organic producers to \$140,000 over four years.

New enrollment option through incentive contracts to address priority resource concerns.

Requires advance payment option be offered to historically underserved producers.

Authorizes direct program assistance to WMEs such as irrigation districts, acequias and other public or semi-public entities for the purposes of improving water use efficiencies.



Environmental Quality Incentives Program

Conservation Incentive Contracts (CIC)



It all begins with a farm visit!

The USDA Natural Resources Conservation Service (NRCS) make farm visits, develop plans, and provide technical and financial support for individuals who want to manage their property for specific wildlife types or for general wildlife habitat improvement.

As your conservation decision partner, NRCS provides free assistance to landowners like you to reach land use and natural resource goals. Our local offices, staffed with conservation professionals with local knowledge, can help you make well-informed conservation decisions.

We love what we do!

That's working with farmers, and forest landowners like you to start, expand, enhance, or improve your natural resources and put conservation practices in place that will benefit the soil, water, air, and wildlife.

Getting Started with NRCS

Schedule a Farm Visit. Call or email your local USDA Service Center to set up an appointment.

How to Prepare. What is your vision for your land and farm? What are your challenges? Prepare a list of questions and concerns for your NRCS conservation specialist.

What to Expect. An NRCS team member will visit your property and ask about your goals for your land and can help you develop a plan to obtain them. During our farm visit we can discuss conservation planning and what financial and technical support is available for you.



West Virginia
**Natural
Resources
Conservation
Service**

WV • February 2022

Overview

The Environmental Quality Incentives Program (EQIP) is a voluntary conservation program administered by the USDA Natural Resources Conservation Service (NRCS) that offers farmers, ranchers, and nonindustrial private forest landowners financial and technical assistance to help plan and implement conservation practices and activities on working agricultural and forestry landscapes.

What Are EQIP Conservation Incentive Contracts?

Conservation incentive Contracts are available nationwide to help producers address priority resource concerns. In West Virginia, to participate in EQIP CIC eligible participants are required to improve terrestrial wildlife habitat on forestland or associated agricultural land. Producers may use incentive contracts as a “steppingstone” from correcting resource issues on specific land units through EQIP to achieving sustainable stewardship on their entire operation.

“Forestland across West Virginia is a predominant land use. EQIP CIC will provide eligible participants an opportunity to improve terrestrial wildlife habitat for various species using a comprehensive, long-term approach,” said NRCS- WV State Conservationist, Jon Bourdon.”

Contract participants may be eligible for annual management payments as well as payments for installing supporting practices to improve wildlife habitat. Contracts are for a minimum five year period.

Learn more about NRCS-WV Programs

[Visit NRCS-WV programs web page](#) to learn more about USDA's financial and technical conservation assistance.

How to Apply

NRCS accepts applications for EQIP year-round. To apply, producers should contact their [local USDA Service Center](#).

www.wv.nrcs.usda.gov

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Wildlife Conservation Management Practices



Forests

West Virginia's diverse forests are home to songbirds, wild game, and fish. Healthy forests provide clean air and water, flood protection, wildlife habitat, recreation, aesthetic enjoyment, jobs, and numerous other services

and products that we enjoy every day. **Some WV Species:** Cerulean Warbler, Golden-winged Warbler, Ruffed Grouse, and Wild Turkey.

Partners NRCS frequently work with for wildlife conservation include:

- WV Department of Natural Resources
- U.S. Fish and Wildlife Services
- USDA Forest Service (USFS)

Various Non-Profit Organizations:

- Trout Unlimited (TU)
- National Wild Turkey Foundation (NWTF)
- Appalachian Mountains Joint Venture (AMJV)
- American Bird Conservancy (ABC)

Contact Us

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Upland Wildlife Habitat Management

Upland wildlife habitat management is creating, maintain, or enhancing areas to provide food, cover, and habitat connectivity for upland wildlife.



Early Successional Habitat Management

Early Successional Habitat Management is used to influence the natural succession of plant communities, which usually progresses from grasses to trees, in order to benefit wildlife or plant communities. Various techniques such as light disking, mowing, and clearing forest openings can be used.

Wildlife Conservation Supporting Practices *



Forest Stand Improvement Forest Stand Improvement is used to manage tree species composition, tree density, and forest structure by cutting or killing selected trees and undergrowth to achieve desired forest conditions.



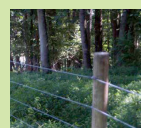
Brush Management Brush Management is used to control undesirable, non-native, and invasive woody vegetation such as autumn olive, bush honeysuckle, Japanese barberry, multiflora rose, oriental bittersweet, tree of heaven, and grapevine. Treatments may be mechanical, chemical, or a combination of the two.



Tree/Shrub Site Preparation and Tree/Shrub Establishment Tree/Shrub Site Preparation is used to improve growing-site conditions prior to establishing a stand of trees and shrubs. Tree/Shrub Establishment is then used to establish trees and shrubs by planting seedlings or cuttings, by direct seeding, or through natural regeneration.



Structures for Wildlife Structures for wildlife are habitat components such as brush piles, used by wildlife for nesting and escape cover. Make the most of debris created as a byproduct of other forest management practices when planning wildlife structures.



Access Control and Fence Access Control and Woodland Exclusion Fence are used to restrict livestock from forestland. Unrestricted access to forestland can be detrimental to forests, wildlife, streams, and even livestock themselves.

* List shows common supporting practices, other conservation practices may apply.

WEST VIRGINIA WILDLIFE HABITAT



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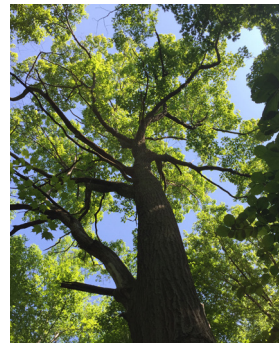
What to Expect. An NRCS team member will visit your property and ask about your dreams and goals for your land and can help you develop a plan to obtain them. During our farm visit we can discuss conservation planning and what financial and technical support is available for you.

The Benefits of Helping Wildlife

Sustainable agriculture practices on farms and forests benefit wildlife by improving soil health, water quality and plant diversity. They also create profitable, productive agricultural land that is more resilient to drought, fire, and other natural disturbances.

Managing for a diverse set of conditions for all types of wildlife provides the best chance to attract a bigger pool of wildlife species.

West Virginia Wildlife Habitat



Forests West Virginia's diverse forests are home to songbirds, wild game, and fish. Healthy forests provide clean air and water, flood protection, wildlife habitat, recreation, aesthetic enjoyment, jobs, and numerous other services and products that we enjoy every day. **Some WV Species:** White Oak, Cerulean Warbler, Golden-winged Warbler, and Ruffed Grouse



Grasslands Whether they span 1 or 100 acres, privately owned farms (including pastures and cropland) across West Virginia provide food and habitat for wildlife and all sorts of animals. **Some WV Species:** Milkweed, Monarch, Eastern Meadowlark, and Eastern Cottontail



Aquatic Clean, fresh water is as important to birds, bats, butterflies, and other wildlife as it is for people. It supplies food and cover for a large diversity of animals, and serve as migration routes and connectors between

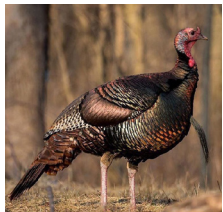
habitats for a variety of wildlife. **Some WV Species:** Brook Trout, Eastern Hellbender, and Louisiana Waterthrush



West Virginia
Natural Resources Conservation Service

WV • October 2021

Our Conservation Partners



Sometimes it takes a village to create quality wildlife habitat!

NRCS experts from many disciplines work together with state and local partners to ensure effective conservation practices.

Individually the federal, state,

and nonprofit groups that comprise our conservation partnerships have a diversity of expertise in discipline, location/area, and focus. As partners in conservation, we share our unique areas of expertise to better put sustainable conservation on your land.

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- U.S. Fish and Wildlife Services
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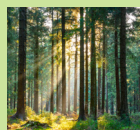
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Common West Virginia Wildlife Conservation Practices



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Visit our website: www.nrcs.usda.gov/wv

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Maple Syrup Production

NRCS Opportunities



Partnering with NRCS

The U.S. Department of Agriculture, Natural Resources Conservation Service (NRCS) assists private land users in addressing natural resource concerns. West Virginia has a long history of maple syrup production and in recent years, interest in maple and other types of tree syrups has increased.

NRCS assists syrup producers by providing conservation technical assistance. This assistance may lead to funding through the Environmental Quality Incentives Program (EQIP). NRCS conservationists work with landowners and managers to implement energy and forestry conservation practices on the farm. For many of these operations, conservation work is mostly for the sugar houses or facilities where the syrup is processed.

EQIP Ag Energy Assistance

Why does syrup production depend on energy? The sap collected from trees is mostly water. To get to the thick consistency and rich taste we all love, water needs to be evaporated, and that takes energy. Through EQIP, energy auditors conduct an Agricultural Energy Assessment, recommending possible conservation practices to use energy wisely.

Through EQIP, energy assistance is available to producers in two ways.

1. EQIP enables the producer to identify ways to conserve energy through an Agricultural Energy Assessment, also known as a Conservation Evaluation and Monitoring Activity (CEMA 228). An Agricultural Energy Assessment is also known as an on-farm energy audit. Agricultural Energy Assessments are typically completed by a certified Technical Service Provider (TSP).

Payment for the completion of an Agricultural Energy Assessment is provided through EQIP based on the type and size of the agricultural operation.

2. After an Agricultural Energy Assessment (228) is completed, a producer may be eligible for additional financial assistance to implement various recommended measures using Energy Efficient Agricultural Operation (374) conservation practice.



NRCS provides financial assistance through the Energy Efficient Agricultural Operation (374) conservation practice to upgrade inefficient equipment with more efficient technology such as reverse osmosis (RO), evaporators, and high-efficiency pre-heaters. These upgrades can reduce fuel burning leading to better air quality and a streamlined syrup operation.



EQIP Forestry Assistance

NRCS also provides assistance for forest management practices that would benefit sap producing trees. To qualify for financial assistance, producers must complete forest management practices consistent with an NRCS-approved forest management plan. Two beneficial forestry practices are as follows.

1. Forest Stand Improvement (CPS 666) includes activities that will favor maple species and other tree species used for sap collection and syrup production by forest stand improvement to reduce competition.
2. Brush Management (CPS 314) includes removal of invasive species such as autumn olive, Japanese barberry, bittersweet, or grapevines that can invade sugar bush stands.

For additional information on how NRCS can assist you please contact your local NRCS Field Office.

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Typical forest stand improvement activity.



Maple syrup evaporator in a WV sugar house.



West Virginia
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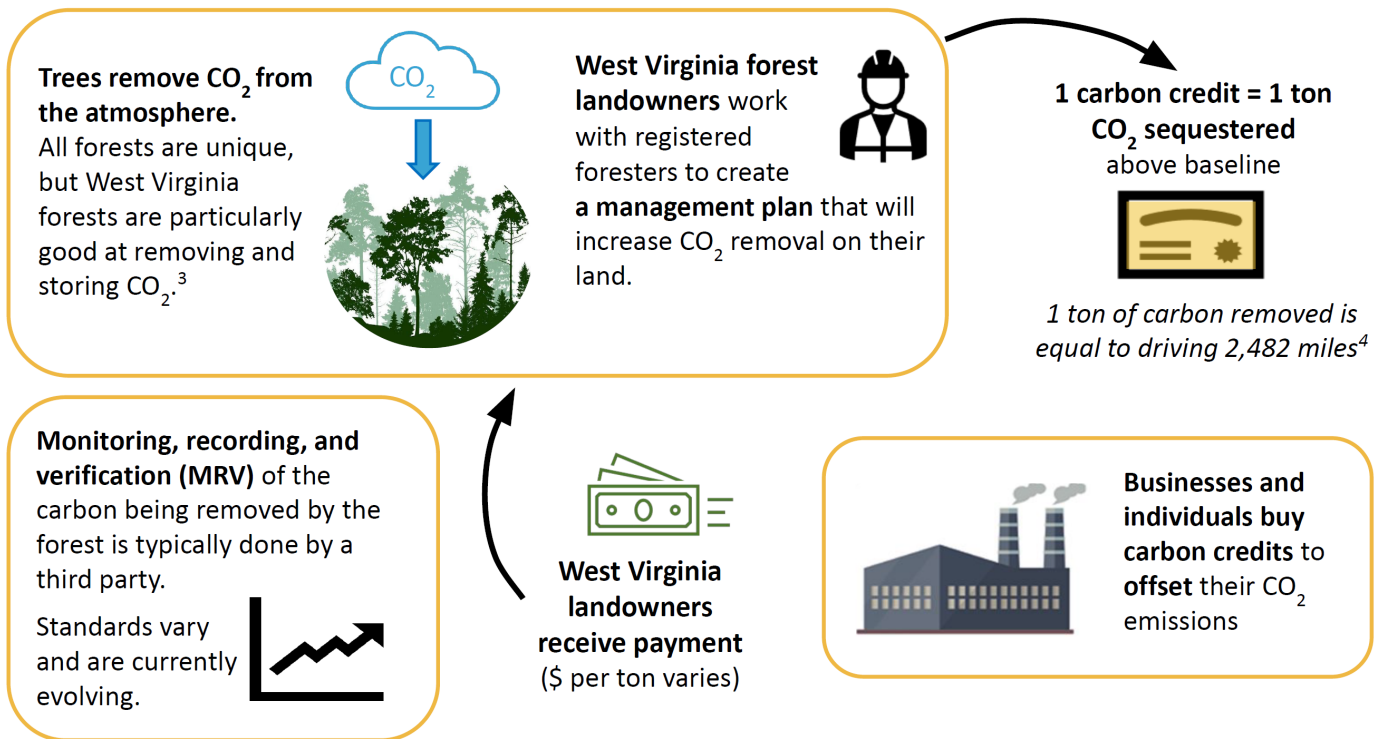
Forest Carbon Markets

How do forest carbon markets work in West Virginia?

The carbon market allows landowners to earn money for increasing the carbon stored on their land.

West Virginians can sell carbon credits to companies interested in meeting their net-zero emission goals, also known as carbon offsets. Approximately 78% of West Virginia's land area (12 million acres) is forested, about half of which is owned by families. With the proper management plan, these families can choose to enroll in a carbon offset program to get paid for actively managing their forest.

The graphic below describes how the carbon market works for forest landowners.



Highlights

- The 12 million acres¹ of West Virginia forest are a valuable natural resource that can remove carbon dioxide (CO₂) from the atmosphere.
- 1 metric ton of CO₂ taken up by managed forests can be sold as 1 carbon credit to companies and individuals interested in offsetting their carbon emissions.
- To date, almost 28 million credits² have been sold to corporate landowners in West Virginia, and programs exist to facilitate family forest owner participation.
- In most cases, landowners must actively manage and retain rights to harvest timber on their land to be eligible for a forest carbon offset program.

- Several cost-share programs exist to help landowners develop their forest management plan.
- Numerous third-part entities exist that purchase, sell, broker, measure, and verify carbon credits.
- The monetary value of one ton of carbon fluctuates and is expected to increase.
- Currently, the market is driven by private industry and is largely unregulated.

There are several forest carbon programs currently operating in West Virginia.

Program Name	Acreage Requirement	Pricing	Term Agreement Duration	Harvest Allowed?
California Air Resources Board (CARB)	40+ <i>(not profitable <2,000 acres)</i>	Variable, depends on market \$20-\$100+ per acre per year ¹	25-year credit term & 100-year monitor term	Yes
Family Forest Carbon Program ²	30-2,400	Depends on acreage, forest condition, management plan \$50-280/acre	10-20 years	Yes
Working Woodlands Program ²	2,000 +	Variable, depends on carbon credits market	Variable, long-term easements (e.g., 40 years)	Yes
NCX ³ National Capital Exchange	None	Variable, landowner bids. Ex.: \$8/acre in 2020 PA bid ⁴	1 year	No

Source: West Virginia University, 2022. Based on data from [Forest Carbon Works](#)¹, [The Nature Conservancy](#) and [American Forest Foundation](#)², [NCX](#)³, and [Penn State Extension](#)⁴.

In most carbon offset programs, timber harvest is allowed.

Many programs *require* that the landowner owns the right to their timber, and certain harvest practices may increase the number of carbon credits produced. However, one program in West Virginia, Natural Capital Exchange (NCX), *does not allow* harvesting during their one-year contracts.

Early termination of carbon offset agreements leads to penalties.

For most contracts, early termination requires the landowner to pay back the carbon credit payments they received and a termination fee. The fee covers the cost of monitoring and enforcing carbon credits on forest lands and can cost over \$250,000.

If the land is bought, sold, or inherited, the new owner must uphold the contract or pay back the carbon credit payments and fees.

In the event of a natural disaster that kills trees and removes carbon from the land, landowners are not penalized, however the contract may be terminated.

All programs have different land requirements.

- Most forest carbon offset programs require a forest management plan from a registered forester.
- Many consider the minimum tree cover, % of native species, number of acres, etc.
- Landowners participating in West Virginia's Managed Timberland Program are currently still eligible to participate in carbon programs *that allow timber harvest*.

Participation in the carbon market is always voluntary for landowners.

Some confusion may arise from hearing about “voluntary” versus “compliance” markets. These refer to whether the companies buying the offsets are doing so voluntarily or if they required by law to offset their emissions, such as for businesses operating in California.

References:

¹[Kelly and Schmitz, 2016](#); ²[CARB](#); ³[The Nature Conservancy and American Forestry Foundation](#)

Landowner Carbon Programs

Prepared by: Anthony F. Pappas, CF

Owner, Heritage Habitat & Forestry

Current as of: 01/15/2024



✉ HeritageHabitatCo@gmail.com 📘 Facebook.com/HeritageHabitatCo
 🌐 HeritageHabitatCo.com 📞 (330) 419-1769

Company Name	Anew Climate	Forest Carbon Works	American Forest Foundation / The Nature Conservancy	Finite Carbon	Green Assets	LandYield	Living Carbon	NativState	Working Trees
Program Name	Natural Climate Solutions	Forest Carbon Works Conserve	Family Forest Carbon Program (FFCP)	Large Landowner	Forest Carbon	LandYield	Living Carbon Reforestation Program	NativState	Working Trees
Program Type	All nature-based solutions	Improved Forest Management (IFM)	Improved Forest Management (IFM)	Improved Forest Management (IFM) & Afforestation / Reforestation	Avoided Conversion (AC) & Improved Forest Management (IFM)	Improved Forest Management (IFM)	Afforestation / Reforestation (A/R)	Improved Forest Management (IFM) & Afforestation / Reforestation (A/R)	Silvopasture
Marketplace	Compliance & voluntary programs available	Voluntary	Voluntary	Compliance & voluntary programs available	Compliance & voluntary programs available	Voluntary	Compliance & voluntary programs available	Compliance & voluntary programs available	Voluntary
Registry & Protocol	All	Verra (VM00003)	Verra	All (as relevant and appropriate)	Compliance Projects: California ARB Voluntary Projects: ACR	ACR Small Non-Industrial Private Forest Landowner Methodology	ACR & Verra (VM0047)	ACR IFM 1.3 & 2.0	Verra
Active States & Regions	U.S. & Canada	Entire U.S.	Central Apps: PA, WV, & MD (OH coming soon) Midwest: MN, WI, & MI Northeast: ME, NH, MA, CT, NY, & VT Southern Apps (coming soon): TN, KY, AL, GA, NC, SC, VA	North America (specifically, U.S. & Canada)	Non-federal land in U.S.	AL, AR, FL, GA, KY, LA, MS, NC, OK, SC, TN, TX, VA	Entire U.S.	AR, AL, MS, TN, MO, LA, & TX	Eastern U.S.
Minimum Acreage	5,000 forested acres	40 forested acres	30 contiguous forested acres	5,000 forested acres	Varies by project type, typically 5,000+ acres across all tracts	40 forested	300 unforested acres (need not be contiguous)	40 forested acres	No minimum
Ineligible Properties	Federal-owned	Publicly-owned (gov't, state, municipality)	Non-private lands, plantations, silvopastoral systems, non-commercially viable forests, forests less than 30 acres, legal encumbrances that restrict harvesting	Federal-owned property or any property where harvesting is legally restricted	Federal-owned	Sites with legal restrictions that prevent timber harvesting, or already enrolled, publicly owned, &/or more than 5,000 acres	Forested (>10% canopy cover)	Previously enrolled carbon programs & certain conservation easements	Previously reforested in past 10 years, highly organic soils, & land being converted directly from rowcrops
Method of Credit Assessment	Combination of remote sensing & permanent field survey plots	Combined remote sensing & field inventory	5-yr monitoring cycles using installed monitoring plots on selected properties	Various (CORE Remote Sensing or Ground-based data assessment)	Credits are generated on an annual basis, with an onsite re-inventory required every 5-6 years.	Remote sensing in combination with ground data from USFS FIA	5-yr monitoring cycles using both ground-based & remote sensing techniques in-house	Timber inventory plots	Mobile phone application. Landowner indicates where trees are at planting and periodically remeasure
Contract Length	10 reporting periods (1-5 year periods)	60 – 125 years	20 years	10 reporting periods	Varies, typically 15-20 years	40 years	40 years	40 years	30 years
Contract Terms	Landowner agreeing to sustainable forest management practices	Improved forest management practices that maximize carbon storage & sequestration; harvesting is allowed over contract duration	If landowner decides to harvest in contract area, they must follow modified harvest guidelines	Terms & key requirements disclosed following completion of a site feasibility analysis	Legal commitment to keep land in sustainably managed forestry for life of project	20-year harvest deferral for first 20 years. After the project's first 20 years, landowner will also be permitted to harvest growth in excess of Y20 carbon stocks.	Fully cost-covered site preparation & tree planting	Selective timber harvesting permitted or deferring harvests for length of contract	Planting of trees and monitoring growth over time
Key Requirements	Length of contract commitments vary upon protocol	Harvest flexibility (10% carbon stocking set aside for climate smart forestry practices); 60-year commitment (25 years crediting-payments + 35-year monitoring)	Harvest restriction of 25% total basal area / 10% reduction of average QMD, & others	Terms & key requirements disclosed following completion of a site feasibility analysis	Timber can typically be harvested within annual forest growth. Projects require a 40 to 100+ year commitment	Enrolled forestland must have merchantable volume. 40-year commitment with no harvesting for the first 20 years.	Harvest restrictions for length of contract, no grazing for up to 5 yrs. Allows selective tree thinning operations.	Harvest restrictions for length of contract	No pre-existing grants (EQIP)
Payment Calculation	Netback structure based upon the actual offset sales	Productivity & reassessment to allow for market growth	Rate per acre depends on cover type/practice that the land is eligible for. Fixed for 20 years.	Terms & key requirements disclosed following completion of a site feasibility analysis	Revenue share based on carbon credit sales	First 3-years landowners get paid at a fixed price of \$11 per credit issued each year. After year-3 landowners will get paid 55% of revenue from sale of carbon credits	Landowner payment independent of credit quantity. Fixed payment structure.	Based on royalty percentage, determined by acreage size, re-assessed annually	Option of guaranteed payment for first 15 years, or market rate
Landowner Assistance	Anew ensures everything is implemented & in compliance with the project. Landowner controls all forest management activities.	Sales Team & Professional Foresters working in all parts of the country	Participation & enrollment free for landowners, free expert consultation with forest professionals, financial assistance for management plans that are customized for your unique goals for your land, & payments to help reach your goals	Terms & key requirements disclosed following completion of a site feasibility analysis	Green Assets has a dedicated team of experts, including Certified Foresters & wetland scientists who will provide guidance to landowners on management activities.	LandYield covers all costs so landowners pay nothing to enroll. Landowners need to complete the application and provide necessary ownership documentation while LandYield handles everything else. Landowners need to fill out quarterly attestations about any forest activity. LandYield staff on hand to support landowners & answer any questions.	In-house land & forestry experts. Full reforestation costs covered.	Landowner receives forest management plan, management assistance & wildlife habitat development assistance	Working Trees can connect landowner with technical advisors if needed
Permitted Firewood Removals	Yes	Yes	Yes, with restrictions	Yes	Yes	Yes	Yes	Yes	Yes, but notice required

Company Name	Anew Climate	Forest Carbon Works	American Forest Foundation / The Nature Conservancy	Finite Carbon	Green Assets	LandYield	Living Carbon	NativState	Working Trees
What Makes Program Unique?	Anew develops, markets, & sells the offsets on behalf of the landowner	Harvest flexibility, market growth (revenue share) options in payments, durable & quality credit generation (almost entirely removal credits)	Pays landowners to implement practices on their land that promote carbon sequestration. Technical assistance, forest management education, & more provided to landowners	Full-service forest carbon project developer. Finite never takes ownership, control, or discretion of landowner's carbon credits. Quality, integrity, & additionality are of critical importance.	Landowners working with landowners. Tailored program developed for each unique property.	Allows landowners to selectively enroll only the stands they want in the program, & issue high-quality credits Fortune 500 companies desire	High-quality reforestation & habitat restoration of degraded or unproductive lands, focus on Appalachia, working with a strong team of local & national expert partners, high quality genetics & improved tree varieties	Small landowner-focused, boots-on-the-ground assessments, & additional assistance in forest management	The only agroforestry project in the U.S.
To Learn More	Email Tommie Elder telder@anewclimate.com or Josh Strauss jstrauss@anewclimate.com	Forestcarbonworks.com & chestnutcarbon.com	familyforestcarbon.org	finitcarbon.com	Visit green-assets.com or email Drew Hall dhall@green-assets.com	LandYield.com	livingcarbon.com/land or email land@livingcarbon.com	nativstate.com	farming.workingtrees.com
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Learn more at our [website!](#)

Forest Carbon Consulting

Introduction

There are several private companies that offer landowner forest carbon programs. These programs essentially pay the landowner for their forest's carbon sequestration & storage. We offer forest carbon consulting to advise landowners in the available forest carbon programs offered in their area.

We can advise you through the different programs to help you choose which program fits your goals and ownership plans for your property.

Why Heritage Habitat & Forestry

To-date, we have conducted over 200 forest carbon consultation & project advisements in various states, including Ohio, Maryland, Pennsylvania, and West Virginia. We have a direct professional relationship with several forest carbon companies, & are able to communicate efficiently with program administrators to answer any questions, provide feedback, etc.

Our service includes a forestry consultation site visit whereas we walk through and discuss your property, as well as your goals for your land & what you strive to accomplish. Our experience, professionalism, and personability with forest carbon and landowner consultations make us an exceptional choice to provide your forest carbon consulting needs.

Types of Forest Carbon Programs

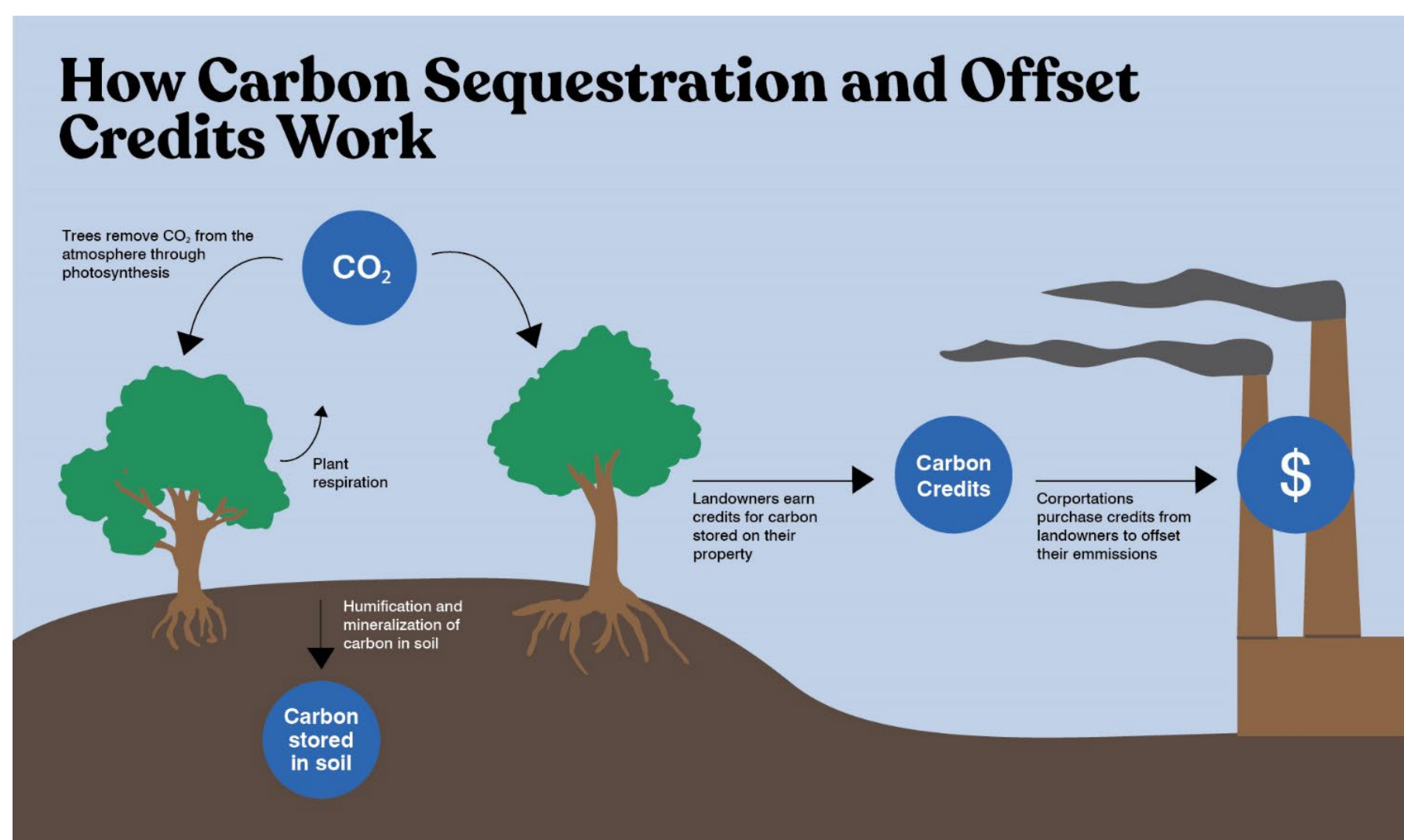
We provide consultation & advisement for types of forest carbon programs: Improved Forest Management, Avoided Conversion, & Afforestation/Reforestation. The type of program best suited for your property will be evaluated during our consultation process. We have several carbon companies providing one or the other type of program to private landowners.

Property Visit

For those program(s) that require an on-site assessment, Heritage Habitat will visit your property on your schedule, preferably to meet you on property to conduct a walk through in addition to the forest inventory required for the program you have applied for.

Large Landholdings

For properties over 5,000 acres, in addition to the previously mentioned programs, there are carbon project developers who may develop and individualized forest carbon program. Research in to these programs is on an individual case-by-case basis. If your property is greater than 5,000 acres reach out to us specifically to learn more about individual carbon project development.



<https://www.outdoors.org/resources/amc-outdoors/conservation-and-climate/how-amc-is-fighting-climate-change-through-carbon-credits/>



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Getting the Most Return From Your Timber Sale

Don't Just Sell Your Timber, Market It

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F-37

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Approximately 84 percent of Ohio's forest land is owned by private nonindustrial woodland owners. Each year many of these individuals receive significant income from their woodlands by properly marketing timber. In addition, by following management guidelines in selecting those trees to be harvested and those to leave standing, they improve the health and vigor of their forest as well as its quality for other uses. However, some woodland owners sell their timber for only a fraction of its value because they do not market it properly.

If you are thinking about selling timber or if you are approached with an offer to buy some of your timber, don't "jump too quickly." Taking time to find out what you have to sell, then choosing the appropriate method of marketing will usually result in substantially more income and satisfaction for the seller.

If you have little or no experience in woodland management or timber marketing, seek the assistance of a professional forester. The Ohio Department of Natural Resources (ODNR) Division of Forestry has foresters located throughout the state who, at no cost, can provide assistance in selecting trees that should be harvested and can recommend related timber stand improvement practices to help achieve your ownership goals. They can also provide limited marketing assistance.

Many of the large forest industries in the state will also provide limited forest management and marketing assistance to private woodland owners. In addition, there are several consulting foresters who, for a fee, can provide marketing services from timber volume and value estimation to sale closure. Fees for assistance in harvesting and marketing are usually a percentage of the gross receipts of the sale. You can obtain names and addresses of consulting foresters in Ohio from local county offices of Ohio State University Extension, the Ohio Department of Natural Resources (ODNR) Division of Forestry offices, or from the Ohio Association of Consulting Foresters.

In this publication, guidelines are presented to help individuals market timber. These suggestions are not meant as a substitute for advice and assistance from a professional forester, but rather to help you as a landowner to understand and implement proper timber marketing procedures. There are eight important steps to effectively marketing timber from private woodlands:

1. Determine the **reasons for selling timber**.
2. Determine the **specific trees to cut**.
3. Estimate the timber **volume to be cut**.
4. Select the proper **timber sale method**.

5. **Advertise** the timber sale.
6. **Select the buyer.**
7. Enter into a **contract** with the buyer.
8. **Monitor** the harvesting operation.

Step 1: Why Sell Timber?

There are several reasons why a woodland owner may decide to sell timber. First, a harvest may be prescribed in the overall forest management plan. If a woodland owner has worked with a professional forester to develop a management plan for achieving ownership objectives, it is quite likely the plan will call for periodic timber harvesting. Timber cutting is one of the forester's major management tools and is useful not only for generating income from a forest, but for accomplishing other objectives such as improving the health and vigor of the forest, developing wildlife habitat, altering species composition, establishing planting areas, creating vistas and trails, and developing certain types of recreational activities.

Second, the woodland may be used as a source of income, which may be an objective of your management plan. While the value of woodlots will vary depending on such factors as size, quality, species composition, etc., a woodlot in good condition can have considerable value and can be managed to yield periodic or emergency income.

Third, timber may be harvested to salvage the value of trees that have been damaged to such an extent that they will not recover or where the potential for such damage is extremely high. Ice and snow storms, fire, insects, and disease are factors that could cause enough damage to justify a salvage cutting.

Fourth, timber may be harvested in order to use the land for other purposes ranging from golf courses and parking lots to crop production and pastureland. The timber on such land often has considerable value and should be marketed. However, landowners contemplating timberland conversion should carefully evaluate the proposed conversion, particularly if it is to a more intensive agronomic use such as pasture or cropland. Much of Ohio's current forestland, particularly in southern and eastern Ohio, will not support more intensive agriculture because the soils are either too shallow, too low in fertility, and/or the slopes are too steep.

Steps 2 and 3: Determine What You Have to Sell

In order to advertise a timber sale to potential buyers and to give some indication of its potential value, the landowner must determine what to sell. This involves deciding which trees or areas in the woodland are to be cut and then determining for each species the number of trees and/or volume of wood or amount of products to be sold.

Selecting Timber for Sale

Unless the harvest is being carried out to clear the land for other uses, selection of trees to be harvested should be done with the advice of a professional forester to ensure that the harvest will satisfy your objectives and maintain the woodland in a vigorous and productive condition. The type and intensity of harvesting required will depend on ownership objectives and the type and condition of the woodlot.

Trees selected to be cut should be clearly marked for easy identification. If individual trees are to be cut throughout the woodlot, each is usually marked with tree-marking paint. A paint splotch (yellow is the most visible in the forest) at about chest height and at ground level (stump) is recommended. In addition,

veneer trees are often numbered. If small areas are to be harvested, as in a clearcut, mark the individual trees or the trees around the boundary of the area.

The trees to be cut should be marked so that they can be easily located. For example, all of the marks may be placed on the same side of the trees (e.g., the north, south, east, or west side) or the trees may be marked so they can be seen from a main trail or road.

After selecting the trees to be cut, estimate the volume of wood or the number of products that will be cut in each species. The more common products produced in a timber harvest include sawlogs, veneer logs, pulpwood, firewood, posts, and poles. Obtain publications about measuring these products from your county office of Ohio State University Extension.

Step 4: Selecting Method of Sale

Private woodland owners may choose to harvest their own timber and sell the cut product (e.g., veneer and sawlogs, pulpwood, posts, poles, etc.) or sell the trees as they stand and allow the buyer to cut and haul them. The latter method is referred to as selling stumpage.

Harvesting Your Own Timber

The woodland owner who cuts and delivers the logs or other products to the roadside or mill may substantially increase profits from the sale. Such an operation, however, should only be undertaken by someone with experience. Logging requires special skills and knowledge, and there are substantial risks involved. Logging is hard, dangerous work. In addition to personal risks, engaging in logging may alter insurance coverage.

Some types of logging may require special equipment; attempting to log with some agricultural equipment could result in extensive damage to the equipment. Logging an area often requires a much longer time than is initially estimated and therefore may interfere with other activities and responsibilities. Furthermore, improper cutting, handling, or transporting of high-value logs can destroy much of their value. For this last reason, the harvesting of high-value species, such as black walnut or white oak trees containing veneer quality logs, should always be left to the buyer.

A discussion of proper techniques of cutting, handling, and transporting timber products is beyond the scope of this publication. If you have the necessary time, skills, and experience and wish to increase profits from your timber sale by harvesting and transporting the products, keep the following points in mind:

1. Have a market for your product before you invest the time and money necessary to harvest it. If possible, have a written contract with the buyer. Don't get stuck with a product to sell without a buyer.
2. Know your buyer's specifications and requirements (e.g., size, volume or number buyer will accept in a given time, quality, etc.)
3. Know your legal responsibilities for such things as workers compensation, minimum wage, social security, state and federal income tax, OSHA requirements, etc. These responsibilities are particularly important if you employ other people.
4. Use the proper equipment.
5. Observe all safety precautions and procedures.
6. Determine if engaging in logging alters any of your insurance coverage.

Selling Stumpage

Most private woodland owners sell their timber as stumpage. Stumpage sales are of two types.

Lump-Sum Sale

A timber sale in which a single payment (the "lump-sum") is made to the seller for the trees designated for sale. This is the easier of the two types of sales to administer.

Sale-By-Unit (also called Sale-By-Price or Sale-By-Scale)

A timber sale in which the seller is paid a certain amount for each unit of product cut (e.g., so many dollars per 1,000 board feet, per cord, per post, per pole, etc.). This type of sale requires someone to measure the products harvested (foresters call this scaling). The scaler may be the landowner, a consulting forester, the buyer (if the seller has complete confidence in him/her), or a receiving mill. The questions of who will provide an accurate production tally and how, when, and where the scaling will be done make this type of sale more difficult to administer than the lump-sum sale.

Woodland owners contemplating a timber sale should acquaint themselves with Internal Revenue Service regulations. Depending on current rules and the landowner's individual situation, one type of sale may provide greater tax advantages than the other. Also, individuals should acquaint themselves with current Internal Revenue Service rules on treatment of sales expenses and depletion allowance, a method for recouping (when selling timber) your original investment in the timber without paying tax on it.

In both lump-sum and sale-by-sale unit stumpage sales, the sale price and buyer are usually determined one of three ways.

• Single Offer

In this case a single buyer contacts or is contacted by the seller, and the buyer offers to purchase the timber at a particular price. While this procedure may produce a fair price, it can result in a price below what another buyer is able to pay. In the following situations, however, it may be the best method:

- a. Seller has only a small amount of timber to sell. In very small sales, only one buyer may be interested.
- b. The timber for sale is of such low quality that very few buyers would be interested.
- c. Markets for the species for sale are so poor that very few buyers would be interested.

A forester familiar with the area will be able to tell you whether any of these situations exist and advise you accordingly. In situations other than those listed previously, selling timber by a bid process will usually produce higher income.

• Oral Bid or Negotiations

A sale in which the seller or seller's agent engages in verbal bidding or negotiations with one or more buyers until an acceptable sale price is obtained. While this type of procedure is fairly quick and sometimes produces the highest sale price, it is not the type of sale someone should engage in who is unfamiliar with timber markets and the quality and the value of the timber to be sold. In short, unless the seller is extremely well informed, it is best to leave the oral timber sales to foresters and timber dealers.

• Written Sealed Bids

A sale in which potential buyers are informed about the sale and given a period of time (usually 4–6 weeks) to inspect the timber and submit written sealed bids. At a specified time and place, the bids are opened and the successful buyer is selected. In most situations, this form of sale produces the most desirable results for private woodland owners.

Steps 5 and 6: Advertising the Sale and Selecting a Buyer

Stumpage is a somewhat unusual commodity in that it has no exact or "going" price. Instead, the selling price is whatever the buyer and seller agree to. This price may be influenced by many factors, including tree species; number, size, and quality of trees or logs; distance of the trees or logs from the market; accessibility of the logging area and difficulty of the logging operation; current market conditions; the buyer's financial condition and how urgently the trees or logs are needed; and differences between buyers in their ability to use the trees or logs. To receive the highest value, several potential buyers should be contacted when timber is for sale. *Don't be too anxious to accept the first offer.*

The most effective way of notifying potential buyers of your timber sale is to send them a timber sale notice. The names of timber buyers operating in your area who would be interested in the type of timber you have to sell can be obtained from the nearest ODNR Division of Forestry office or from many county Ohio State University Extension offices. A consulting forester will also have this information.

A timber sale notice (for a sealed bid sale) should include the following:

1. The name and address of the seller.
2. The location of the sale; include both the legal description and directions for locating the area.
3. A description of the trees to be sold.
4. The type of sale; specify sealed bid lump-sum or sealed bid sale-by-unit.
5. The times when potential buyers can inspect the trees. Usually at least one month is allowed from the time notices are sent until a buyer is selected. If the seller or seller's representative has to be present for potential buyers to gain access or inspect the areas, the times they will be available or how arrangements can be made to gain access need to be described.
6. The date, time, and place at which written sealed bids will be opened and the buyer selected. Include a statement that the seller reserves the right to reject any and all bids if they are not acceptable.
7. Whether or not a deposit binding the offer must accompany the bid and, if so, the amount. The binding deposits of unsuccessful bidders are returned to them immediately after the buyer is selected. The deposit of the successful bidder might not be refunded should he/she later decide to withdraw from the sale.
8. How payment is to be made. On lump-sum sales, full payment (100 percent) by bank or certified check prior to the start of any harvest activity is desirable. On large sales, payment schedules are sometimes negotiated. On sale-by-unit sales, a definite cutting and payment time table needs to be negotiated, with the seller's intent to do this stated in the notice.
9. Any major conditions or limitations on the sale such as the time by which the trees must be harvested, restrictions on access to the area, time or conditions when the logger cannot operate (e.g., when the area is excessively wet), etc. Note that excessive restrictions on buyers may cause a reduced bid or a loss of interest in the sale.

10. The requirement of a performance bond. A performance bond is an amount of money over and above the sale price posted by the buyer and held in escrow by the seller. Its purpose is to assure that the buyer abides by and fulfills all the requirements of the contract. The necessity and amount of a performance bond depends on a number of factors including the buyer's reputation (or lack of, in the case of a company new to the area), the size/value of the sale, and the difficulty of the operation (e.g., high-value residual trees to be left undamaged, steep topography with easily eroded soils, etc.). Performance bonds should be promptly returned at the completion of a properly executed harvest.

The bids are opened on the date and at the time and the place specified. The highest bidder is usually selected unless there is some reason to exclude that particular buyer. Exercise caution in selecting new operators or operators who have not previously logged in the area. A professional forester may offer advice as to the desirability of selecting a particular buyer on an individual sale. Most buyers perform satisfactorily when all of the trees are cut on the area, but only the most experienced and careful buyer should be selected for a timber-stand improvement or selection harvest where valuable trees will be left standing. While this may, on occasion, result in accepting a bid other than the highest, it will protect the future quality and value of your woodland.

If you desire additional advertising for a timber sale, place a brief advertisement in the newspaper directing interested buyers to contact you or your agent for a complete description of the sale. This may be a particularly useful method when the main product anticipated from your harvest is firewood. Some firewood cutters do not cut other products and may not appear on a list of local buyers and loggers.

Step 7: Entering into a Contract with the Buyer

To reduce the possibility of misunderstandings and disagreements, a written contract between the buyer and the seller is absolutely essential when selling timber. OSU Extension fact sheet F-38, *Timber Sale Contracts*, discusses the process of developing a timber sale contract and the provisions that should be considered for inclusion in such a contract.

Step 8: Inspecting the Harvesting Operation

If possible, the landowner should request to be informed several days before cutting begins so that he/she or a representative can be present on the harvest area the first day. This will provide an opportunity to discuss the operation with the buyer or the buyer's representative on the site. This is also a good time to clarify points of agreement and to have some input on things not outlined in the contract.

Once the timber harvest begins, visit the area frequently to make sure that the harvest is proceeding according to the terms of the contract and to discuss questions that might arise. This will also allow you to become more familiar with timber harvesting operations which may be useful in future timber sales.

Use good judgment and discretion when checking the harvest operation. Unless a flagrant violation of the contract is discovered, a simple suggestion to the buyer will usually solve the problem. Deal directly with the buyer or designated representative. Do not complain or make suggestions to other individuals on the job.

When the job is completed and all provisions of the contract have been fulfilled, write a letter releasing the buyer from the contract and return the performance bond if one has been posted.

Summary

In closing, it is important to emphasize several points.

1. Don't "jump too quickly" to sell your timber to the first offer, but actively market your timber as discussed in this fact sheet. Properly marketing timber usually will dramatically increase your returns. Remember, there is no "fair market" value for your timber—its value is what a buyer is willing to pay. It is important to contact as many buyers as possible in order to receive the highest offer.
2. Under most circumstances, you will be more pleased with the results of your timber sale if you seek the services of a professional forester. Studies have shown that private forest landowners who sell timber with the assistance of a professional forester receive more money for their timber, cut fewer trees, have more residual volume and economic value left in the forest, and are more satisfied with the whole experience.
3. Stay involved in the timber sale throughout its duration. By so doing, you will become more familiar with timber marketing and harvesting operations which may be useful to you in the future. Being involved will also assure you that the operation is proceeding according to your understanding and the terms of the contract.

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PURDUE UNIVERSITY

How to Treat Timber Sale Income

William L. Hoover, Professor of Forestry and Natural Resources, Purdue University

Reporting Timber Income on Federal Income Tax Return

Two basic determinations must be made to report the gain or loss from the sale of standing timber, called a stumpage sale. These are

- (1) amount of the gain or loss, and
- (2) type of gain or loss.

Amount of Gain or Loss

The amount of gain or loss is determined by reducing the amount received for the timber (sale proceeds) by the allowable basis of the timber and any expenses incurred in making the sale.

$$\text{Net gain (loss)} = \text{sale proceeds} - \text{allowable basis} - \text{sale expenses}$$

Example 1

Joe Smith sells all the merchantable timber, 105 MBF, on their 35 acres of forest land, the same year they purchased it. The amount paid by the buyer is \$20,000. The allowable basis is determined as explained in FNR-FAQ-2, *Determining Tax Basis of Timber*. The costs for the services of a consulting forester, having a lawyer check the contract, and other selling expenses totaled \$2,200. The net gain from the sale is as follows:

Sale proceeds	\$20,000
Less: Allowable basis (cost basis)	(\$12,068)
Sales expenses	(\$ 2,200)
Net gain	\$ 5,732

Joe Smith would report \$5,732 on his tax return as discussed next.

Timber Depletion

The determination of the net gain in Example 1 was simplified by the assumption that all of the merchantable timber was sold in the same year the forest land was purchased. This made it possible to reduce the sale proceeds by the entire cost basis of the merchantable timber. If only a portion of the timber is sold, only a similar portion of the cost basis can be recovered. The portion of the cost basis written off against a particular sale, known as the allowable basis or depletion allowance, is determined by multiplying the number of units (volume) sold by the depletion unit, as demonstrated in Example 2.

Example 2

Assume Joe Smith sells only 60 MBF, instead of the entire 105 MBF of merchantable timber as was assumed in Example 1. The depletion unit for the timber is \$114.93 per MBF, obtained by dividing the \$12,068 basis in the timber by 105 MBF. The allowable basis is 60 MBF times the depletion unit of \$114.93 per MBF. Assume the selling expenses are \$1,400 and they receive \$12,000 for the 60 MBF of stumpage. The net gain is as follows:

Sale proceeds	\$12,000.00
Less: Allowable basis:	
60 MBF x \$114.93 per MBF	(\$6,895.80)
Sales expenses	(\$ 1,400.00)
Net gain	\$ 3,704.20

Joe Smith would report \$3,704.20 on his tax return.

The volume used to determine the depletion unit in the year timber is sold is the total volume of timber on your forest land in the year of sale, not the volume sold. Thus, it is necessary to estimate the total volume of timber as well as volume marked for sale. If some time has passed since you acquired your forestland, you may also need to adjust the basis of your timber for additional expenditures made to improve the timber or for previous losses.

Type of Gain or Loss

With rare exception, the net gain from the sale of standing timber in the Midwest qualifies as a capital gain or loss. If owned for more than one year, it would be a long-term gain or loss. If the timber had not been owned for more than one year, any net gain or loss would be a short-term gain or loss. Most forest owners in this region sell timber infrequently and don't depend on the timber as a primary source of income. In technical terms they "aren't holding the timber primarily for sale to customers in the ordinary course of a trade or business." However, if your timber is part of a business, then the gain or loss is reported differently. It goes on Form 4797, instead of Schedule D of your Form 1040. Note that the law was changed recently so that if your timber is part of a business, you owned it for more than one year, and you sell it on the stump for a lump sum amount you qualify for long-term capital gains treatment. Under prior law you would have had to sell it with a pay-as-cut contract to so qualify.

Qualifying and reporting gains from stumpage sales as a capital gain, long-term or short-term, provides an advantage because capital gains are not subject to the self-employment tax. And, if it qualifies as a long-term capital gain, it is taxed at a lower income tax rate. Stumpage sales are reported on Schedule D of Form

1040. If held for more than one year the sale is reported in Part II. The following information is reported in the columns: (a) "sale of standing timber," (b) date you acquired the forest land with timber, (c) date you sold the timber and received payment, (d) amount received from buyer, (e) add together your allowable basis and any selling expenses and insert the total here, (f) usually blank, (g) column d less e. It's rare to have a loss from a timber sale, but if your allowable basis and selling expenses exceed the amount received the net loss is reported in column(f). After reporting any other gains and losses follow the instructions on Schedule D to determine the amount to carry over to the front of Form 1040.

You do not need to know the allowable basis of timber you sell to report the proceeds as a capital gain. If you haven't made the determination described in FNR-FAQ-2 your allowable basis is zero and the only amount reported in column (e) would be any selling expenses.

Cautions

Profit from the sale of logs, lumber, or other products you produce from your timber, or pay someone else to produce for you does not qualify as capital gains. The revenues and expenses from such activities are reported on Schedule C or F as ordinary income. Capital gains treatment may be in question if you agree to a so-called "shares contract" with a logger. The usual agreement is for the logger to cut your timber and sell the logs to a mill or other buyer. The log buyer then pays the logger his "share" and writes a separate check to you for your share." The split is part of your agreement with the logger.

For more details go to the National Timber Tax Web site at: <http://www.timbertax.org>

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