
THE FAMILY FOREST CARBON PROGRAM
Unlocking the carbon potential of America's family forests
The Nature Conservancy
American Forest Foundation


• FFCP FORESTER ROLE
• PROJECT PLANNING AND WORKFLOW IN THE CRM
The Nature Conservancy
American Forest Foundation

FFCP FORESTER ROLE

Covered in the FFCP forester agreement:

- Determine FFCP project eligibility, schedule site visit, complete project planning in CRM
- FFCP forest management plan template writing (applicable in the Appalachian Region, and Northeast Region

Other ways to interact with FFCP:

- 3rd party Forest management plan writing
  - Landowner and consulting foresters may work together to create a plan that will incorporate their FFCP goals that is not an FFCP template.
- Pre/post harvest data collection
  - Landowners who chose to harvest are required to work with a qualified forester to collect and submit data prior to and after harvesting
- NRCS CPA-52 form completion post enrollment
- Herbicide treatments
  - Landowners and consulting foresters may work together to improve forest health
- Monitoring
  - Consulting forester firm may be contracted to collect forest inventory data on FFCP enrolled properties that allows for the matching comparison to FIA plots

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The Landowner Journey

Landowner goes to FFCP website and utilizes the "Check Your Eligibility" Tool to start the process.

Find your property on website map tool.

FFCP Contact Center reaches out and confirms basic eligbility. **FFCP Account Manager** provides further information and collects information from the Landowner.

Speak with a representative about specifics.

FFCP Forester determines eligbility and plans an FFCP project.

Connect with FFCP forester on your property.

Work with forester to develop management plan.

Landowner receives stipened and hires a **Forester.**

Receive your first payment.

Review your contract and sign.

Once project planning is finished, the **FFCP Account Manager** delivers offer and then contract to sign to **Landowner**.

Landowner moves to **FFCP Continual Engagement Team** for support during their 20 year contract.

FFCP ELIGIBILITY & PROJECT PLANNING

ALL landowners, including your existing clients, must utilize the CRM to start their eligibility and project planning process with FFCP.

- If your client has a group ownership structure, they must designate a representative for the group to be a contact during the process.
- Once the landowner has completed the website intake tool, an Account Manager will be assigned, and the landowner will need to schedule an intake call.
- Once the intake process is completed an FFCP Forester will be connected for project planning and site visit.

All work for eligibility and project planning will be completed in the CRM database by the forester.

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NAVIGATING AND WORKING IN THE CRM

Summary Tab – READ ONLY INTERACTION

The summary tab is where you find basic information about the woodland, including landowner name and contact information. It displays estimated forested acreage which directly ties to invoicing the program, and displays parcel ID information as well. It is important to understand that your role on this page is read only, and imperative that you do not adjust the journey stages at the top for any reason. All discrepancies should be discussed with your FFCP representative IE the Landowner assigned to you needs to add a parcel.

Mapping Tab – EDITING PERMISSION

The mapping tab is where you will find spatial information relating to the woodland. Spatial information may be downloaded from the CRM for use in GPS applications. You have the ability to upload .kml, zipped shapefiles, geodatabase, or GPS exchange format files that are created in other GIS systems. You may also utilize the Polygon Tool and Create Stands directly from the Parcel(s). This is where you will need to deliver spatial files of the eligible project region for the program and name them appropriately.

Objectives Tab – NO ROLE

Management Plan Tab – EDITING PERMISSION

The management tab is where you will find or upload completed management plans for the program.

NAVIGATING AND WORKING IN THE CRM

Qualification Tab – READ ONLY PERMISSION

The qualification tab is where you will find additional information gathered from the landowner during website and intake such as ownership structure and harvesting activity.

Timeline Tab – EDITING PERMISSION

The timeline tab is your main form of communication to the program on the progress of eligibility and project planning. It is important to document assignment acceptance, scheduled site visit dates, and any delays in site visits with the landowners. You may also find the outcome of management plan reviews done by the program, which will give you an indication of what you may see for eligibility during your site visit.

FFCP Documentation Tab – EDITING PERMISSION

The FFCP Documentation tab is the last step in project planning for the program and must be completed for every assignment you have accepted for the program, regardless of the outcome. It is important to understand that once you finalize the project planning in the FFCP Documentation tab, this will trigger other FFCP teams to generate a contract for the landowner. If mistakes were made during the finalization of a project, please make those corrections by going through the steps within the tab again and then notify your FFCP representative of the corrections made.

STEP 1 PROJECT PLANNING

FFCP LANDOWNER ASSIGNEMNTS AND AGREEMENT TIMELINES

Landowners in need of FFCP service will be assigned to you by email.
Assignments will come from mailer@crm.woodscamp.com (add this to your friendly list in your email).



The number of landowners that may be assigned to you is determined by your capacity in the CRM database.
*Follow up with your FFCP representative will be needed to set your capacity once training is completed.

- Clients who name you during the intake call will be assigned to you in the CRM.

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STEP 1 PROJECT PLANNING

FFCP LANDOWNER ASSIGNEMNTS AND AGREEMENT TIMELINES

Once you are assigned a woodland, head to the CRM and login.

- Read the Timeline notes.
- Read the Qualification notes about the landowner and parcels.
- Check the management plan tab to see if they submitted a plan to the program.

You have 2 weeks from the email to accept/decline the landowner assignment.

Accepting the landowner requires a Timeline note to be entered into the CRM and documentation of your outreach to them.

For example: Accepting landowner assignment, reached out to landowner by phone. Left voicemail and waiting to hear back for scheduling eligibility and project planning site visit. Remember to hit Save.

If a landowners become unresponsive after 2 outreach attempts for scheduling a site visit, you must notify your FFCP representative.

Declining the landowner requires a note in the timeline and an email to be sent to your FFCP representative.

Inaction in the database after a woodland is assigned to you will result in the work order bing reassigned to

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STEP 2 PROJECT PLANNING

LANDOWNER OUTREACH AND AGREEMENT TIMELINES

Once you accept an assignment, you will need to reach out to the landowner either by email or phone and gather information.

- Introduce yourself as their FFCP Forester who will be determining eligibility and planning their project.
  - Setup a date to visit their property, ask them for access and detail any equipment you may need to bring (ATVs, UTVs) to collect the forest data to determine eligibility in your region.

- Make a timeline note about this communication and your scheduled site visit date (mm/dd/yy) in the CRM database.
  - Site visits are to be completed within 30 days of accepting the landowner assignment.
  - Automated reminders will be sent for landowners in need of service.
  - Site visit date must be documented in the form of mm/dd/yy.
  - Inaction in scheduling a site visit will result in the landowner being re-assigned to another forester in the region with capacity.

- Verify ownership structure information.
  - Only 1 deeded owner should be attached to a CRM woodland.

- During initial conversationsAsk if there have been any professional surveys (<10 yrs old) to establish property boundaries.
  - Once you have acquired the recorded survey from the landowner, pass it along to your FFCP representative for digitizing in the CRM.

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STEP 2 PROJECT PLANNING

LANDOWNER OUTREACH AND AGREEMENT TIMELINES

- Inquire about future development plans for the property.
  - Future development plans (cabins, roads, ROWs) will need to be excluded from the project area.
- Confirm or inquire about current use or state forest tax program plan.
  - Noting that enrollment in FFCP must be compatible with landowner plans or current enrollment in programs.
- Document any delays in conducting a site visit for project planning in the CRM Timeline.
  - Examples may include: Landowner wishes to have family present during eligibility site visit, site access is winter only so will need frozen ground conditions, etc.

The timeline in the CRM database will be the form of communication you must use regarding the status of project planning for the program.

STEP 3 PROJECT PLANNING

PREPARE FOR THE SITE VISIT

- Using your Regional Eligibility and Criteria for Delineating Forest Land in FFCP, identify regions to investigate for FFCP eligibility.

- You may create shapefiles of the regions needing a field check prior to your visit.
  - You can utilize the CRM mapping tools or a GIS application of your choosing.
  - Reference the website Quick Guide 'Creating an FFCP project area : Using the CRM Mapping Tools and Punching out Individual Stands in Mapping'
  - Make sure to exclude any future plans for development (cabins, roads, ROWs).

- You can download the parcel data from the CRM to uploaded in a GIS/GPS application of your choosing.
  - If the landowner has a recent (<10yrs) recorded land survey, submit it to your FFCP representative for digitizing. The spatial data for the project should follow the digitized survey boundary in the CRM (if applicable).

- Upload the stands created into a GPS application of your choosing to take into the field.

STEP 3 PROJECT PLANNING

PREPARE FOR THE SITE VISIT

Criteria for Delineating Forest Land in FFCP.

Exclude areas from the project area (stand) if area in question is:

If tree-covered:

- Less than 10 percent canopy cover by live tally trees of any size or has had at least 10 percent canopy cover of live tally species in the past, based on the presence of stumps, snags, or other evidence – For example: Savannas, or
- Less than 1 acre in area and not embedded in larger forest – “forest islands”, or
- Less than 120’ wide at its widest and not embedded in larger forest – “forest islands”, or
- Less than 120’ wide at its widest or 363’ long at its longest if the area is serving as a roadside buffer, streamside buffer, or shelterbelt strips, or
- Area is tree-covered in agricultural production settings, such as fruit orchards, grazed woodlots, or tree-covered in urban settings, such as city parks.

If not tree-covered but embedded in forest land:

- At least 1 acre in size and at least 120’ wide at its widest. For example: ponds, or prairies
- Permanent, man-made structure such as:
  - Well pad
  - Home site
  - Right of way of any size

STEP 4 PROJECT PLANNING

CONDUCT THE SITE VISIT AND DETERMINE ELIGBILITY

Conduct your FFCP cruise and record your findings on the National Planning Form (found online).

- Random distribution of variable area plots (choose your BAF).
- The number of plots is based on the FFCP project area acreage, that you may have pre-mapped.
- Cruise data you collect should reflect the eligibility criteria for the FFCP practice in your region.

Use Table Sampling Intensity by Project Size in the Forester Manual for the number of plots to install. Keep in mind this is the minimum number of plots for FFCP region, you may install more if needed.

FFCP Project Size (acres of FFCP Region)	Minimum Number of Plots
100	7
150	8
200	9
300	11
500+	15+

+Cruise one additional plot for every 50 acres beyond the first 100 acres

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STEP 4 PROJECT PLANNING

CONDUCT THE SITE VISIT AND DETERMINE ELIGBILITY

- The minimum number of plots to install will not change when considering additional acreage for the FFCP project area.

FFCP Project Size (acres of FFCP Region)	Minimum Number of Plots
100	7
150	8
200	9
300	11
500+	15+

+Cruise one additional plot for every 50 acres beyond the first 100 acres

For example:

You have been assigned a woodland in the Midwest region. You have identified that there is potentially 30ac. of maple-beech-birch forest type group that could meet the basal area per acre requirement of 90 sqft. You also see the potential for enrolling an additional 25ac. of aspen-birch forest type group.

According to the forester manual, you would need to install a total of 7 plots for the entire region identified.

You would want to install 4 plots in the maple-beech-birch region and 3 plots in the aspen-birch region. Your analysis should identify the maple-beech-birch forest type species breakout and the eligibility basal area requirement of at least 90sqft. on 4 plots. In the other 3 plots your analysis would be to ensure the basal area requirement of at least 90 sqft is met, and there is no need to analyze species breakout.

STEP 4 PROJECT PLANNING

CONDUCT THE SITE VISIT AND DETERMINE ELIGBILITY

- Once you have collected the field data, you should summarize your findings and determine eligibility for the landowner.
- Inform the landowner of the outcome of your visit, and let them know the next steps.
    - Next steps will be for you to finalize project planning in the database within 2 weeks, following the appropriate workflow for the outcome of the field visit.
        - If they were eligible, the FFCP Account Manager assigned to them will be in touch with their offer and contract to sign after you have finished the workflow in the database.
        - If they were ineligible, FFCP will send a farewell email after you have finished the workflow in the database.

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STEP 5 PROJECT PLANNING

FINALIZE PROJECT PLANNING AND AGREEMENT TIMELINES

- To finish your landowner assignment and receive payment per your Agreement, you will need to return to the CRM woodland profile and follow the appropriate workflow below within 2 weeks of your site visit concluding.

- There are 2 workflows that present themselves after a site visit concludes:
  - A landowner who is ineligible for FFCP.
  - A landowner who is eligible for FFCP.

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STEP 5 PROJECT PLANNING

FINALIZE PROJECT PLANNING AND AGREEMENT TIMELINES

INELIGIBLE LANDOWNER WORKFLOW

If the landowner is ineligible, complete the assignment within 2 weeks of your site visit by:

1. Making a Timeline note regarding the eligibility and what was communicated to the landowner.
2. Completing Steps 1 & 2 in the FFCP Documentation Tab.

1. Make a Timeline note regarding the eligibility and what was communicated to the landowner.

- All assignments require a Timeline note regarding eligibility and what was communicated to the landowner after the site visit concluded.

Midwest/Northeast example:

> Landowner was ineligible for the program, maple-beech-birch forest type was observed but basal area too low (~50 sqft/ac). Communicated ineligibility to landowner, and let them know the next steps are for me to complete the assignment within 2 weeks. They should receive a close-out email from FFCP after this is completed.

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STEP 5 PROJECT PLANNING

FINALIZE PROJECT PLANNING AND AGREEMENT TIMELINES

2. Complete Steps 1 & 2 in the FFCP Documentation Tab.
    a. Step 1 asks you about your Forester Visit.
        i. Select appropriate drop downs for the action taken and enter date (if applicable for a site visit).
        ii. This question correlates to the billing tier for your eligibility and project planning work for FFCP.
    b. Step 2 asks you about project eligibility.
        i. Do not select a radial dial, since the landowner was ineligiblee for the program.
        ii. Then you will be asked if this project was eligible, choose No for ineligible landowners.
        iii. Once No is selected you will be given a text box to provide the program an explanation. See guidance below.
        iv. Hit Finish and you are done with the assignment.

- Fill out the text box. Your response should seek to provide the details below, depending on the region.
    Does not meet forest type requirement:
        Describe the forest cover types you observed IE Spruce fir, tamarack, pine plantation
    Does not meet minimum acreage requirement:
        Enter the number of acres that would have qualified for the program
    Does not meet stocking requirement:
        Describe IE MBB region is 50ac. but stocking was 60 sqft/ac on average
    Does not meet volume requirement:
        Describe IE Naturally occurring hardwood region is 80ac., but volume was 3,000 bdft/ac. on average

- Once all steps are completed, submit an invoice to your FFCP representative for payment.
- The landowner will receive a close-out email from FFCP.

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STEP 5 PROJECT PLANNING

FINALIZE PROJECT PLANNING AND AGREEMENT TIMELINES

ELIGIBLE LANDOWNER WORKFLOW

If the landowner was eligible, complete the assignment within 2 weeks of your site visit by:

1. Making a Timeline note regarding the eligibility and what was communicated to the landowner.
2. Finalizing spatial data of project area on the Mapping Tab.
3. Completing the National Planning Form>Simple Planning Form Tab on the excel spreadsheet.
4. Complete Steps 1-5 in the FFCP Documentation Tab.

1. Make a Timeline note regarding the eligibility and what was communicated to the landowner.

- All assignments require a Timeline note regarding eligibility and what was communicated to the landowner after the site visit concluded.

Appalachian example:

Landowner was eligible for the program, observed naturally occurring hardwoods on 120 ac. that was approximately 4,500 bdft/ac. Communicated eligibility to landowner, and let them know the next steps are for me to complete the assignment within 2 weeks. They should receive an email from their FFCP Account Manager regarding their offer and contract

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STEP 5 PROJECT PLANNING

FINALIZE PROJECT PLANNING AND AGREEMENT TIMELINES

2. Finalize your spatial data on the Mapping Tab.

- Upload your spatial data collected from your field visit into the Mapping Tab, or adjust stand boundaries drawn in the GIS application as needed.

- Name your project area according to program nomenclature guidance found on the delineation of FFCP Boundary Guide which can be found on the FFCP website.

Naming format: FFCP Boundary [Practice]: [WoodlandID]-[stand number]

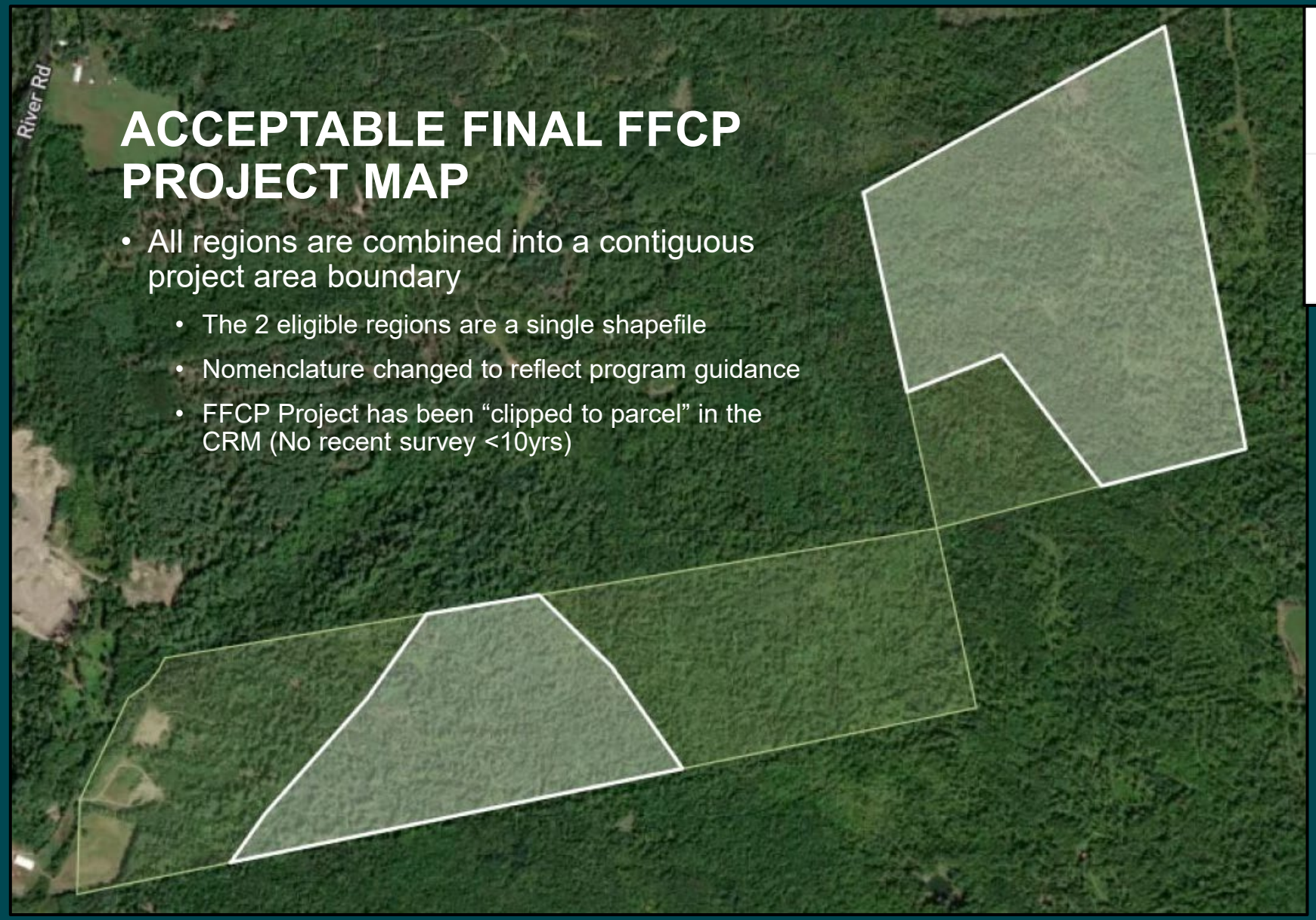
Woodland ID can be found as a number contained within your website browser, alternatively you can select the drop down when creating a stand to give it the appropriate program nomenclature.
https://crm.woodscamp.com/woodlands/31358/summary

- For example if you are assigned a woodland in the NE region, where GOF and EYW applies – you would want to name your stands as such:
  FFCP Boundary [GOF]: 31358 – 1
  FFCP Boundary [EYW]: 31358 - 2

- Ensure project area is snapped to CRM parcel boundary, or if a recorded survey was digitized snap to the digitized survey boundary.

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ACCEPTABLE FINAL MAP



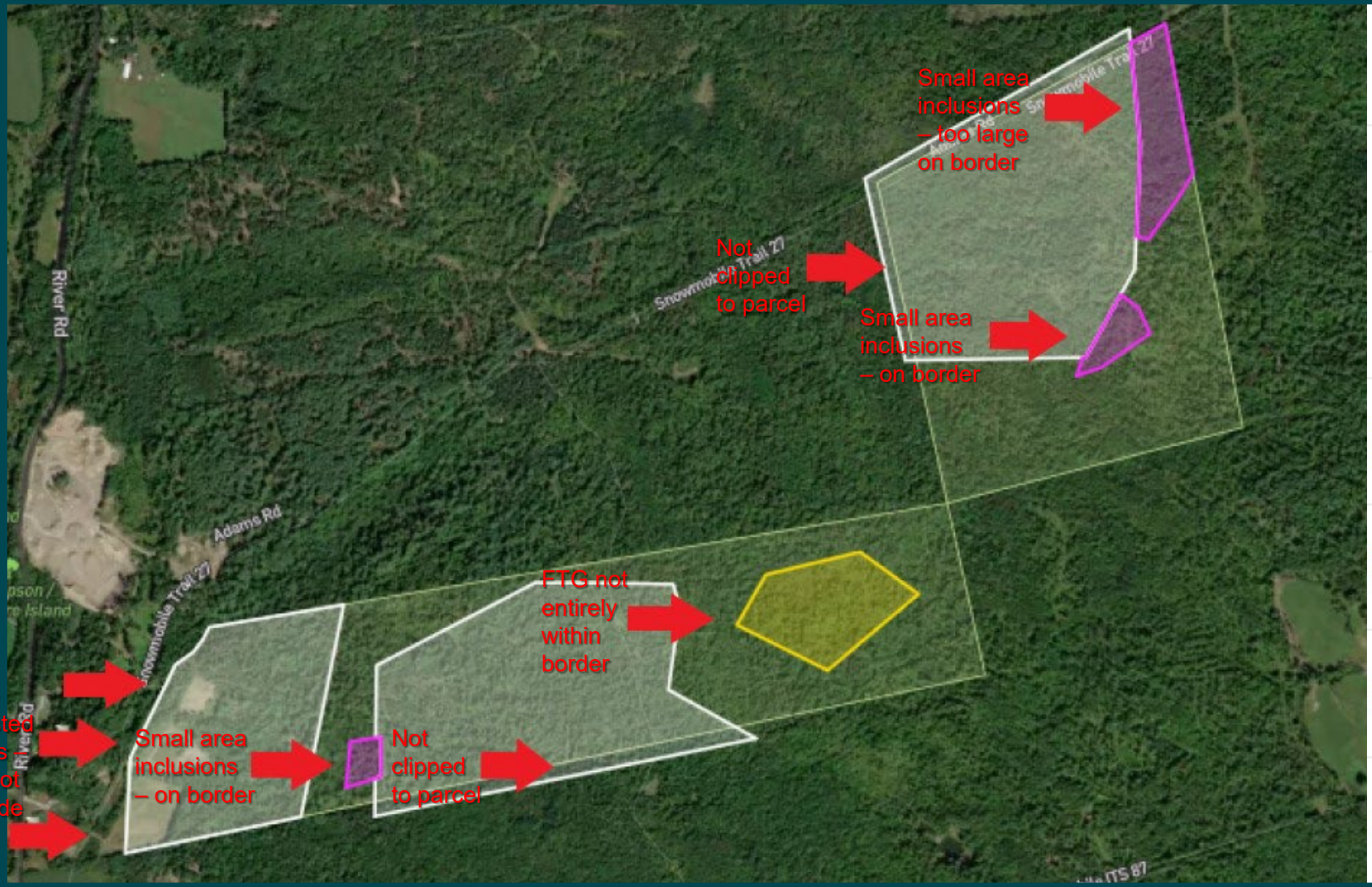
ACCEPTABLE FINAL FFCP PROJECT MAP

- All regions are combined into a contiguous project area boundary
  - The 2 eligible regions are a single shapefile
  - Nomenclature changed to reflect program guidance
  - FFCP Project has been “clipped to parcel” in the CRM (No recent survey <10yrs)

☐	FFCP Project: 31391 - 1	96.17 acres (Calculated using WGS 84 UTM 19N)
☐	FFCP Project: 31391 - 1	53.92 acres (Calculated using WGS 84 UTM 19N)

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UNACCEPTABLE FINAL MAP



Eligible FFCP	56.37 acres (Calculated using WGS 84 UTM 19N)
Stand Nomenclature – does not reflect program guidance	
Eligible FFCP	36.25 acres (Calculated using WGS 84 UTM 19N)
Eligible FFCP	63.98 acres (Calculated using WGS 84 UTM 19N)
Ineligible FTG	12.32 acres (Calculated using WGS 84 UTM 19N)
Understocked - Recent Harvest	1.41 acres (Calculated using WGS 84 UTM 19N)
Understocked - Recent Harvest	2.48 acres (Calculated using WGS 84 UTM 19N)
Understocked - Recent Harvest	8.45 acres (Calculated using WGS 84 UTM 19N)

STEP 5 PROJECT PLANNING

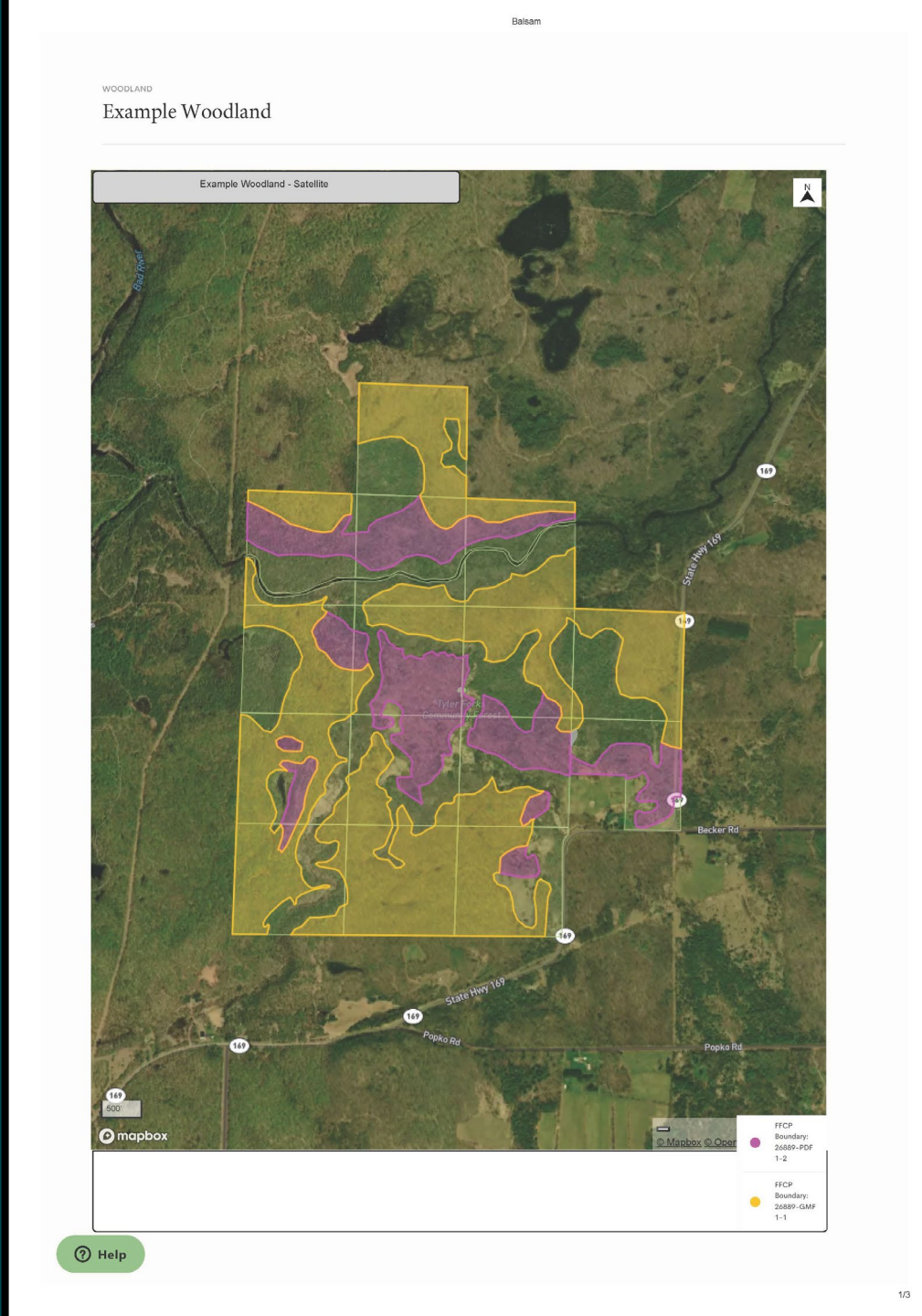
FINALIZE PROJECT PLANNING AND AGREEMENT TIMELINES

3. Complete the National Planning Form>Simple Planning Form Tab on the excel spreadsheet.

    - FFCP Project areas should be summarized on the National Planning Form.

For example: You have been assigned a woodland in the Midwest region. You have determined there was eligibility for the Promoting Diverse Forests Practice (rescinded) and Growing Mature Forests Practice.

You finalized your spatial data on the mapping tab according to program guidance and this is your resulting project area map.



STEP 5 PROJECT PLANNING

You will then summarize your findings from your field data collection efforts on the National Planning Form>Simple Planning Form Tab, which can be found on the Example National Planning Form .pdf.

All regions eligible for the program must be combined into 1 summary.

Stand Level Information Each row should be filled in with field data for FFCP Project Areas and summarize Ineligible Forest Cover Type.

Recommended Enrollment Practice	Stand # or Name	Acres	Does the stand meet the forest type requirement?	Does the stand meet the volume requirement?	Does the stand meet the stocking requirement?	Forest Health Concerns	Recommended/ Approved management activties	Stand details or other notes (stand qualification/non-qualification details)
GMF	FFCP Boundary: 26889-GMF 1-1	272.57	Yes maeple-beech-birch	N/A	Yes 142 sqft/ac	None	STS according to FFCP GMF Practice guidelines	Very dense stocking
PDF	FFCP Boundary: 26889-PDF 1-2	111.86	Yes aspen-birch	Yes 17 cds/ac	N/A	Aspen decline due to age	Coppice according to FFCP PDF Practice guidelines	Very mixed stands, stocking not evenly distributed. Mixed NH regen, some Fir 1200 saplings per acre
none	Ineligible Forest Types 0, 1	207.43	No confier, swamp hardwoods, wetlands	N/A	N/A			
SUMMARY:	0	591.86						

STEP 5 PROJECT PLANNING

FINALIZE PROJECT PLANNING AND AGREEMENT TIMELINES

4. Complete Steps 1-5 in the FFCP Documentation Tab.
    a. Step 1 asks you about your Forester Visit.
        i. Select appropriate drop downs for the action taken and enter date (if applicable for a site visit).
        ii. This question correlates to the billing tier for your eligibility and project planning work for FFCP.
    b. Step 2 asks you about project eligibility.
        i. Select a radial dial for the eligible project. Do not select a radial dial, if the landowner qualified for more than 1 practice.
        ii. Then you will be asked if this project was eligible, choose Yes for eligible landowners.
    c. Step 3 asks you to Create a Project Boundary.
        i. Here you should simply review the spatial data and confirm project areas are snapped to parcel boundaries, as this was completed in Step 2 of this workflow on the Mapping Tab.

STEP 5 PROJECT PLANNING

FINALIZE PROJECT PLANNING AND AGREEMENT TIMELINES

4. Complete Steps 1-5 in the FFCP Documentation Tab.
    a. Step 4 asks you to Select Project Boundary.
        i. You will see all stands you created during your eligibility and project planning process here.
        ii. Only check the boxes for stands that are eligible for an FFCP Project.
        iii. It is very important to ensure accuracy on this step, this acreage will directly correlate to a landowner's offer and contract. Review the Project Area acreage summary at the bottom before proceeding.
    b. Step 5 asks you for the Planning Form Details.
        i. DO NOT USE MANUAL ENTRY FIELDS.
        ii. Under the Planning Form section select the radial dial "Upload Planning Form file" and locate your FFCP National Planning Form on your computer for this woodland.

- Once all steps are completed, submit an invoice to your FFCP representative for payment.
- The landowner will be contacted by their FFCP Account Manager to discuss their offer, and contract to sign.

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PLANNING AN FFCP PROJECT

INVOICING THE PROGRAM FOR ELIGBILITY AND PROJECT PLANNING ACTIVITIES

- All work relating to FFCP eligibility and project planning are covered as a flat rate in your Agreement by the program. Landowners shall not receive invoices for the work described in this training.
  - Payment tables for FFCP Forester services can be found on the national planning form, or in your current forester agreement.
    - Your response to Step 1 in the FFCP Documentation tab, along with the forested acreage reported in the CRM (or what you observed on your site visit) will be the keys to following the billing table.

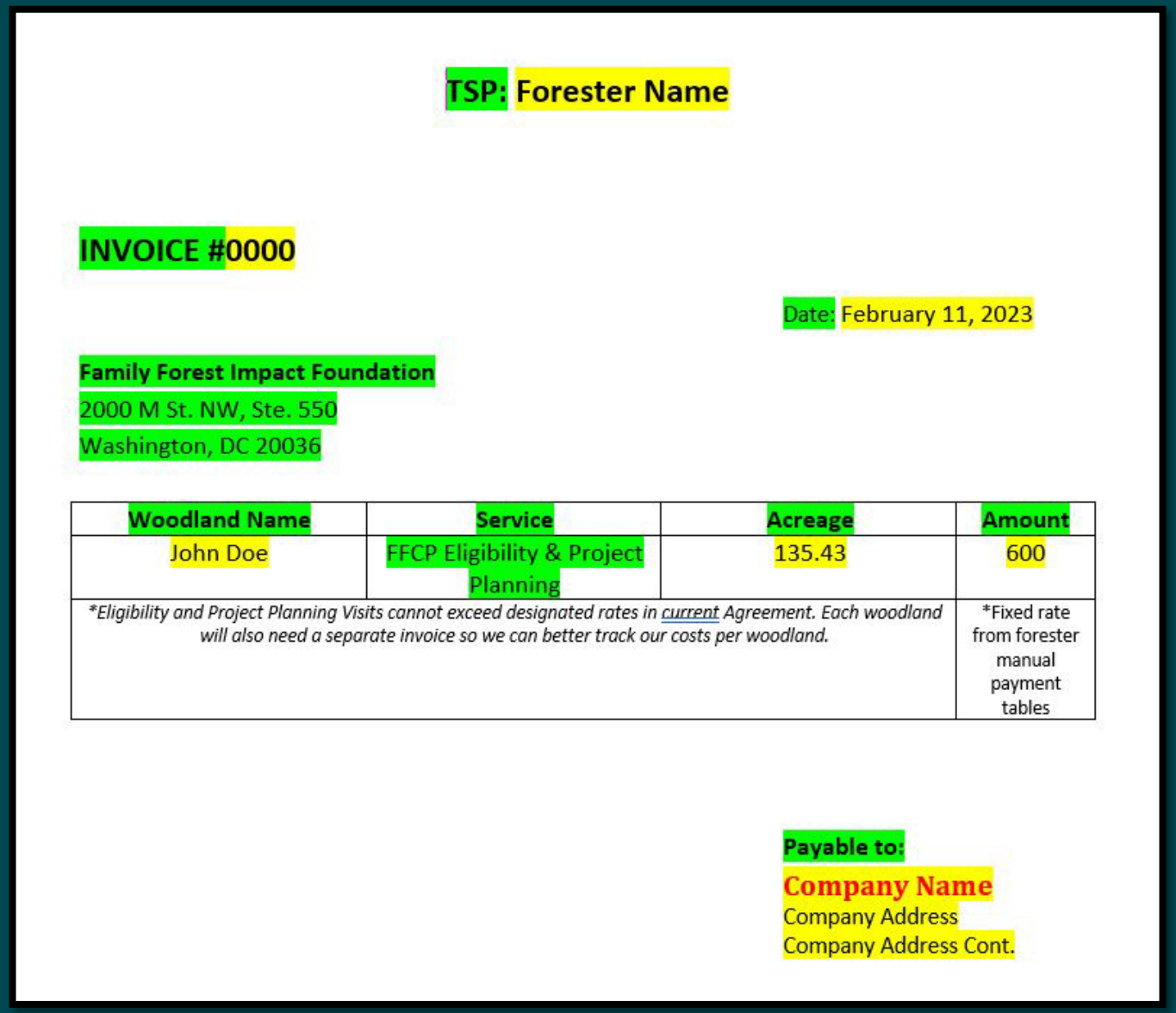
Project area acre range (Forested acreage less maintained areas)	Payment for submitting project planning data, and spatial data (FMP - NO Site Visit Needed)	Payment for completing a site visit, submitting project planning data, and spatial data (Site Visit Needed)
30-99 acres	$200	$500
100-199 acres	$250	$600
200-299 acres	$300	$900
300-499 acres	$350	$1,100
500-999 acres	$450	$1,400
1000-1499 acres	$500	$1,600
1500-1999 acres	$600	$1,900
2000+ acres	$700	$2,100

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PLANNING AN FFCP PROJECT

INVOICING THE PROGRAM FOR ELIGBILITY AND PROJECT PLANNING ACTIVITIES

- Before submitting an invoice ensure all mandatory fields are covered, or you may use the Billing Template sent by your FFCP representative.



TSP: Forester Name

INVOICE #0000

Date: February 11, 2023

Family Forest Impact Foundation
2000 M St. NW, Ste. 550
Washington, DC 20036

Woodland Name	Service	Acreage	Amount
John Doe	FFCP Eligibility & Project Planning	135.43	600
**Eligibility and Project Planning Visits cannot exceed designated rates in current Agreement. Each woodland will also need a separate invoice so we can better track our costs per woodland.*			*Fixed rate from forester manual payment tables

Payable to:
Company Name
Company Address
Company Address Cont.

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CONTACTING YOUR FFCP REPRESETATIVE

FFCP Appalachian Region:
caforester@forestfoundation.org
This is for participating foresters setting up projects in Pennsylvania, Ohio, Maryland, West Virginia, Virginia, Kentucky, Tennessee, North Carolina, South Carolina, Alabama, Georgia, Louisiana

FFCP Northeast Region:
neforester@forestfoundation.org
This is for participating foresters setting up projects in Maine, Vermont, New Hampshire, New York, Connecticut, Massachusetts

FFCP Midwest Region:
mwforester@forestfoundation.org
This is for participating foresters setting up projects in Minnesota, Wisconsin, and Michigan

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Protecting nature. Preserving life.

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