

Forest Stewardship Education Initiative Annual Report January to December 2021

The UC ANR Forest Stewardship Education Initiative was developed as a project through input by the Forest Landowner Education and Outreach Working Group of the California Governor's Forest Management Task Force in 2019. Goals of the Forest Stewardship Education Initiative are to educate forest landowners to better understand, manage and protect their forests by developing a forest management plan, engaging with natural resource professionals, and taking advantage of cost-share opportunities that can help them meet their management goals.

Forest stewardship is based on conservation principles that ensure protection of forest resources including wildlife, timber, soil, water recreational opportunities and natural beauty. Forest stewards actively manage their land by following management objectives based on multiple resources, are economically viable and conserve natural resources. Workshops focused on helping landowners become better forest stewards by helping them learn about forestry, forest management and connecting them to cost-share programs and forestry professionals.



Participant measuring tree diameter during a field day

Issues for private forestland owners in California:

Private non-corporate forest lands make up about 25% of the 33 million acres of forests in California. About 9 million acres are privately owned by individuals, of which 90% own less than 50 acres of forest land. There are 87,000 owners with more than 10 acres of forest land.

Many of these landowners would like to do more to manage their landscape for resiliency against the threat of high severity wildfire and massive tree mortality.

However, the operational environment for small forest landowners is challenging. Regulatory reform, new markets for wood utilization, and increased human capital and workforce are needed to help increase the pace and scale of forest management on private land.

An additional vital need is outreach and education. Active engagement with educational programs allows landowners to identify management goals and challenges, learn from experts and each other, identify resources, develop a community of practice, and more effectively manage their forest over time.

Workshop Overview

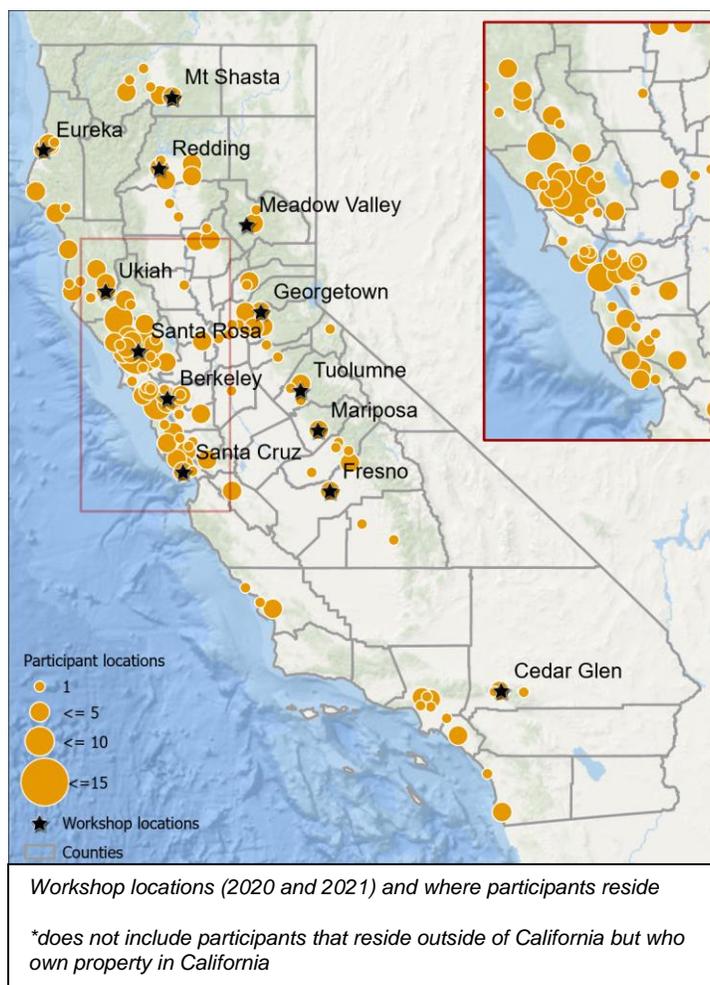
Nine educational workshop events were held in 2021. This included six forest stewardship workshop series completed by a total of 101 people. The workshop series were offered through a hybrid learning style involving online learning assignments, nine weeks of evening zoom meetings, and one in-person field day to view various silvicultural methods and build hands on forestry skills including inventory, mapping, and plant identification. 2021 workshop series were held in:

- Big Sandy Rancheria (Fresno county) – February
- Humboldt County – March
- San Bernardino County – April
- Sonoma County – June
- Tuolumne County – August
- Siskiyou County – October

Since the workshops began in 2020, 252 people have completed one of the 13 workshop series offered.

Additionally, 3 follow-up workshops, also held on line, were offered in 2021 to all who had completed a stewardship workshop series. A total of 89 people participated in workshops on:

- Initial site visit panel discussion – February
- Forest structure and health, tree mortality and Avenza mapping – June
- Targeted grazing – December



Workshop Content

The workshop goal is to help participants draft a California Cooperative Forest Management Plan (CCFMP), which can make them eligible for state and federal cost-share programs. Of the 2021 participants, 56% reported that they were only slightly familiar or not at all familiar with a management plan, and 81% reported having never used or were unsure if they used cost-share programs, illustrating the educational need.

The curriculum relies on the [25-part Forest Stewardship Series](#), a peer-reviewed publication series on forestry and forest management published by UC ANR and targeted at family forest owners. Materials for the workshops

are hosted on the California Family Forest website, <https://www.cafamilyforest.org/> and the UC ANR Forest Research and Outreach website, <https://ucanr.edu/forestry/>. Based on participant feedback, we have expanded the workshop curriculum to include information about prescribed fire and Prescribed Burn Associations. Additionally, we now offer one special session during each workshop series. The topic of the special session is based on the specific need of each co-hort as identified



by the planning committee. Special session topics have included Traditional Ecological Knowledge, pests and diseases, and a more detailed look at forest structure and fuels treatment methods. Content for follow-up workshops is based on participant input (i.e. targeted grazing). Subject matter experts structure their presentations around desired knowledge and questions provided by participants ahead of time. Each follow-up workshop also provides ample opportunity for real time questions and answers. Follow-up workshops are recorded and posted to the UC [ANR Forestry and Range YouTube](#) channel for future reference.

Participants receive additional information on forestry topics through newsletters or blogs almost every month. In 2021, we developed 5 [blogs](#) (Forest Practice Rules, Using Exemptions, Defining Old Growth, Casualty Loss, and Fuels Management in Creeks and Streambeds) and 5 newsletters:

- [Information on the importance of conducting a forest inventory, as well as links to our new four-part forest inventory video series.](#) February 2021
- [Information on cost share programs and grant opportunities for forest landowners.](#) April 2021
- [Home-hardening against wildfire information.](#) July 2021
- [Targeted grazing for fuels management.](#) September 2021
- [Assessing Post-fire Tree Mortality.](#) November 2021

Additionally, to complement the DIY attitude of many of our participants, we developed the California Tree Stick (a customized Biltmore stick, based on a model by the University of Oregon.). Participants receive the Tree Stick during the field day and are taught how to use it. They can then take it back to their properties and practice their inventory skills.



Workshop participant measuring tree diameter with the California Tree Stick during the Sonoma field day



Big Sandy Rancheria participants learning how to correctly hold the California Tree Stick

UCANR: Protecting California's natural resources

What Forest Landowners Should Know About Casualty Losses Before a Wildfire Strikes

Author: Kim Ingram Published on: October 26, 2021

Now that the traditional fire season is nearing an end, it is never too late to think about steps to take before a wildfire impacts your home and forest. According to the [Cal Fire Incidents Overview website](#), the 2021 fire season to date has either damaged or destroyed 3,629 structures and burned almost 2.5 million acres. For those private forest landowners impacted by these fires, claiming a casualty loss on their federal and state tax returns can help mitigate financial losses.

Larry Camp, a California forest landowner, California Registered Professional Forester, member of Forest Landowners of California, and retired IRS forester, gives us a brief overview of what a casualty loss is and what steps a landowner needs to take in order to determine a loss.

What is a casualty loss? In broad terms, a casualty loss for forest landowners is defined as a loss incurred if such losses arise from sudden and unexpected events such as *fire, storm or theft*. This resulting damage may directly impact your forest business, trade or other activities that produce a profit.

Forest ownership type matters. Tax treatment for casualty losses varies for property held as personal property, for investment purposes, or as a trade/business. Generally, homes within forested subdivisions settings, or smaller acreages, e.g. 5 acres or less, where periodic timber harvest would be marginal for economic reasons, would be considered personal property. Since 2017, casualty losses for federal tax purposes for all types of forest property ownership are generally not deductible unless the loss is within an area declared as a Federally Declared Disaster area. However, property owned and managed as a business may be eligible for a business loss due to a fire or other casualty event. California has not amended its statutes to conform to Federal law as of mid-October 2021.

How much loss a landowner can claim depends on the adjusted basis or the change in fair market value "before" and "after" the occurrence of the casualty.

Casualty loss blog post

Participants continue to rate the workshop highly. Over past two years, 67% rated the workshop as excellent and 26% as very good. They agreed that information presented was informative and comprehensive (62% strongly agreed and 38% agreed). As a result of this workshop, 74% strongly agreed and 24% agreed that they had a better idea of how to develop a forest management plan.

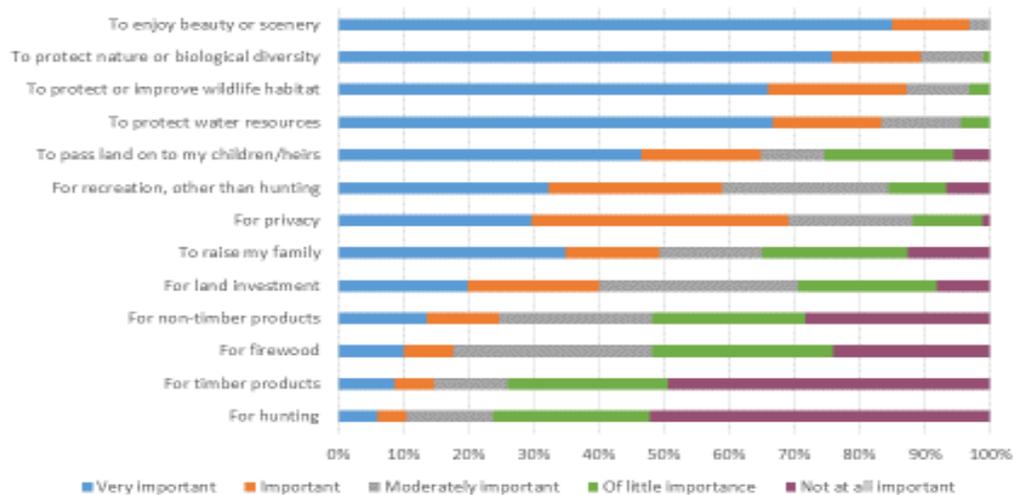
Comments from evaluations included:

- *“I really enjoyed this workshop and plan to recommend it to neighbors. Everything was extremely well organized and facilitated.”*
- *“I loved the field day the most. I developed a forest management plan using the helpful templates and now have 5 long-term goals with specific objectives.”*
- *“Lots of useful information that I will utilize. Looking forward to evaluating my land with the assistance of an RPF to write a good forest management plan to help me reach my land goals.”*
- *“For a beginner, this workshop was great and eye opening.”*
- *“This was extremely helpful. Before the workshop I did not know about all the resources available from the counties the state and especially the UC Extension resources and information. I would have never penetrated the UC Extension website, videos and reading materials on my own.”*
- *“As a non-professional, the workshop helped me understand that there is a process to approach what had previously seemed like an impossible task of forest management, and fire restoration.”*

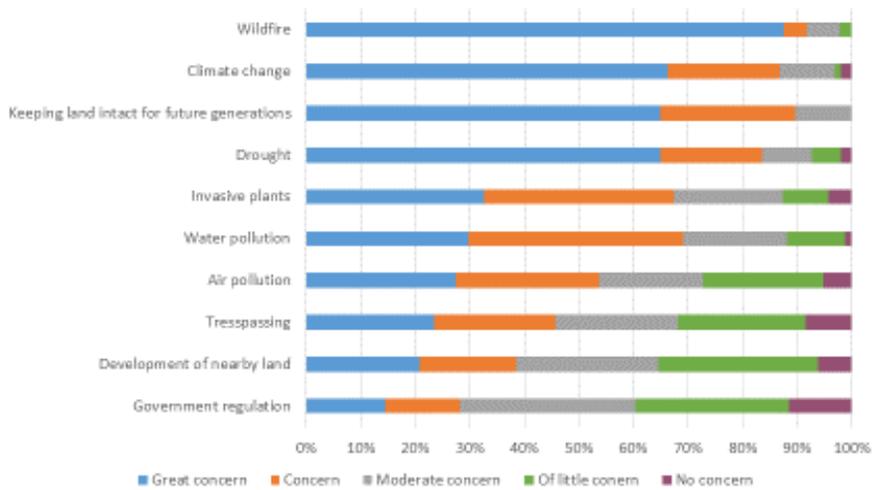
Participant Overview

From the registration and pre-workshop surveys, we gather information about participants’ properties, management attitudes and activities, and what concerns they have about owning and managing forestland. 2021 participants listed similar reasons for owning their land (primarily for beauty, and to protect wildlife habitat, water and nature) and express similar concerns (wildfire, climate change, invasives, drought and keeping their forest land intact) as 2020 participants.

How important are the following reasons for why you currently own your wooded land in California? N= 95

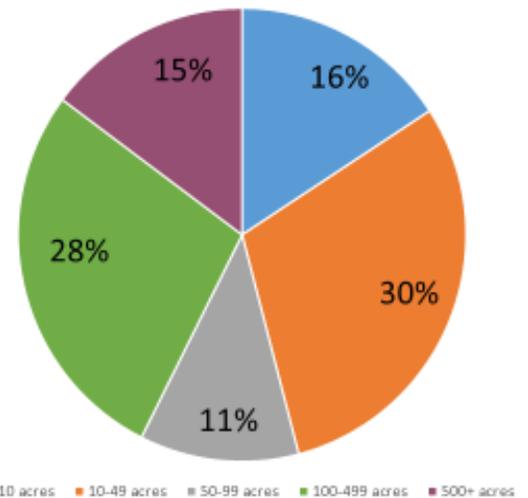


Please indicate your level of concern about each of the following topics. N= 97



Ownership size: The acres owned or managed by participants is fairly evenly distributed amongst the size grouping. Approximately half of this year’s participants own less than 49 acres and the other half own 50 or more acres. Since the start of the workshop in 2020, 46% of workshop participants own less than 50 acres. 54% of workshop participants own 50 or more acres.

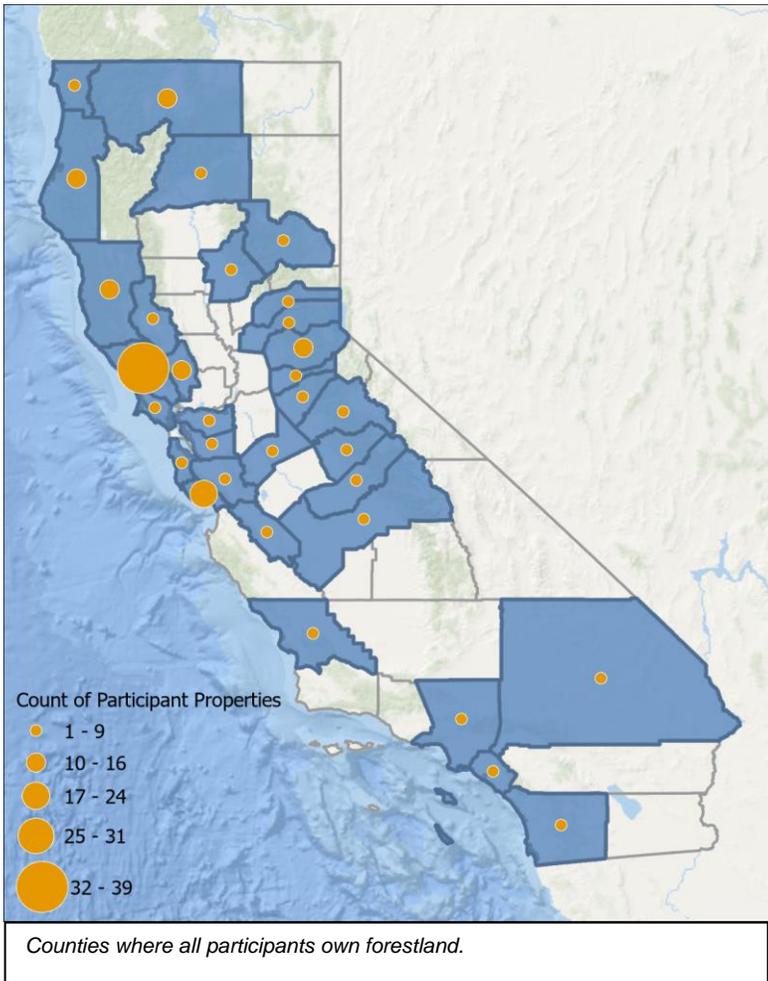
Acres size class owned/managed by all workshop participants (N=209)



Ownership type: 29% of 2021 participants owned their land as an individual or with a partner. 32% owned it with family through partnerships, LLCs or family trusts. 39% had other ownership types. These included non-profits, land trusts, homeowners’ associations, camp managers, local and state parks and open space districts, community colleges and tribes.

Other ownership information on 2021 participants:

- 63% reside on or within a mile of their forestland;
- 56% purchased the land themselves, and 17% inherited the land. The remaining participants do not have direct ownership but may manage the land in some capacity or hold a conservation easement;
- 84% are unlikely or extremely unlikely to sell or give away their forestland;
- 56% have received some kind of advice or information about the care, management or protection of their forestland;

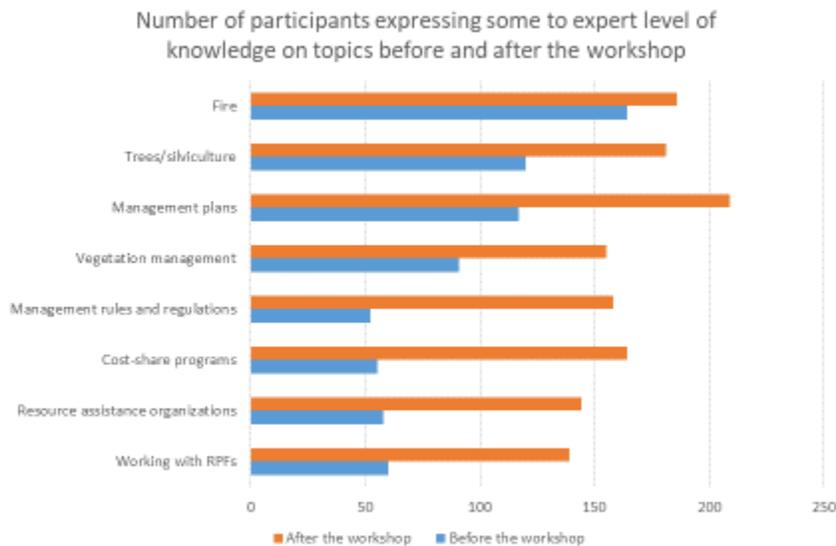


Forest location and type: Participants in the workshop own land in almost all of the forested counties in California. Forest types include:

- 25% mixed conifer
- 24% oak woodland
- 17% Douglas-fir mixed evergreen
- 15% Coast redwood

Participant Learning Outcomes

During each weekly session, participants were asked to rate their knowledge about management topics both before and after the session in order to measure their change in knowledge. As a result of the workshop, participants gained knowledge about all subjects taught, with the most participants gaining knowledge on cost share programs, management plans, management rules and regulations, resource organizations, and working with RPFs.



Program Impacts

Participants who complete a workshop series are asked to complete an on-line survey indicating their intentions for action. On the survey, over three quarters indicated they planned to develop a management plan, consult with their local Cal Fire/NRCS/ RCD offices and apply for cost share funding. 89% said they planned to consult with a Registered Professional Forester. Additionally, participants are showing an interest in doing more hands-on work themselves to learn about their forests. The percentage who very much or definitely plan to carry out a specific action is listed below:



83%
Develop a management plan



84%
Consult with their local RCD/NRCS office



75%
Consult with their local Cal Fire office



89%
Consult with a Registered Professional Forester



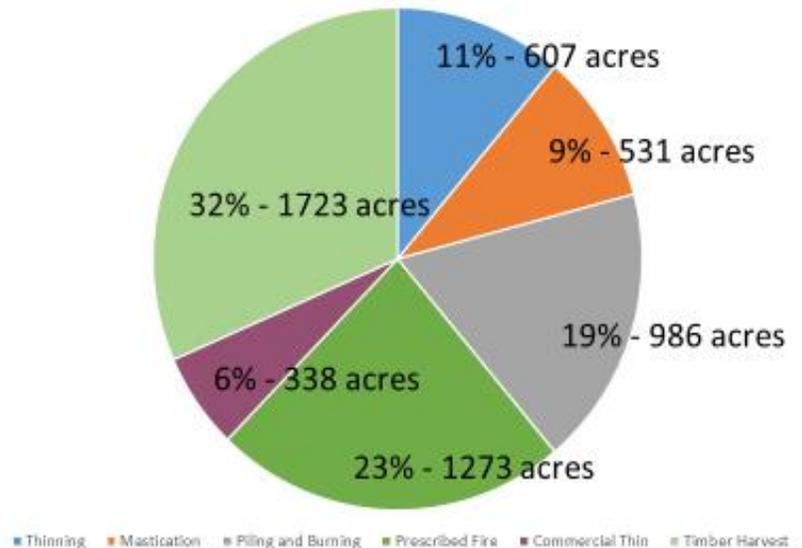
73%
Apply for cost-share funding

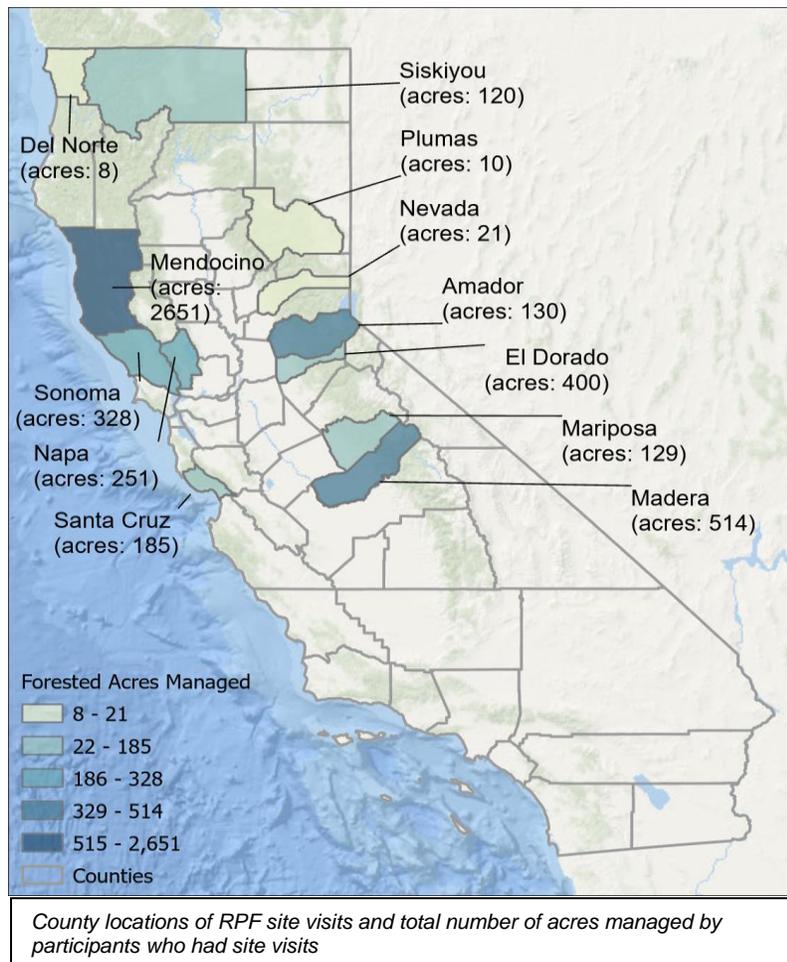


82%
Conduct forest inventory activities

Completion of the workshop series entitled participants to a free initial site visit by a Registered Professional Forester who is paid an \$800 stipend by the program. The goal of this visit is for the RPF to assess participants' plans and goals and identify management practices to meet their goals. It's also to help landowners learn more about RPF services and potentially set up an on-going relationship with a forester. A total of 36 participants had visits by an RPF using the program's stipend by the end of 2021. Together these participants manage over 5,808 acres of forested lands. RPFs recommended a variety of practices on these properties, with the most common recommendations being thinning, piling and burning, mastication and prescribed fire.

Recommended management activity by RPFs during site visits





Follow-up workshops around specific forestry topics have continued to be well attended and have demonstrated increased learning and excitement over certain management activities. Before the targeted grazing for fuels management follow-up workshop, 12% of participants indicated they knew a lot about targeted grazing. After the workshop, 50% indicated they knew a lot or more about the subject. When asked before the workshop how likely they were to use targeted grazing, 37% said they very much or definitely would consider it. After the workshop, 70% said they very much or definitely would consider using targeted grazing to help meet their management goals.

- *“The speakers did an excellent job! I look forward to the field trip.”*
- *“I can’t wait to get animals on the landscape and I look forward to sharing the information with friends.”*
- *“Thank you!!!! This has been a great informative evening!”*

Participant Barriers

Though we are very proud of the outcomes to date of the project, we expected that more participants would have taken advantage of the free RPF initial site visit by now.

We know that landowners experience a number of barriers when trying to manage their forests. Forest management is a complicated process for landowners which includes environmental review, contracting and

compliance monitoring. Practices can be expensive and contractors who can complete fuels reduction projects are in high demand or limited in numbers in certain parts of the state. Landowners may not have merchantable trees because of their size or the lack of wood products infrastructure near them.

To try and gain understanding and insight, we developed an information gathering project to identify the most common barriers faced by motivated landowners when trying to manage their landscape and the strategies they are using, or not, to overcome them. The project was cleared by the UC Davis Institutional Review Board and consists of open ended, semi structured interviews with participants via Zoom. The conversations were recorded, and transcripts were imported into Dedoose qualitative analysis software. 21 participants from 15 counties, representative of ownership types and acreage, volunteered to be interviewed about their forest management issues and successes. We have only begun to analyze the data and will be formally reporting out later in 2022.

What the interviews are telling us

Forest Stewardship Workshop participants have a variety of goals for their forestland. Participants are looking to improve the health of their forests, reduce fuel loads, restore their forests post-fire, create or improve wildlife habitat, improve roads, and increase forest resiliency to wildfire. All have strong attachment to their land and want to know more about their forests.

“Mostly I’m interested in restoring this forest. I’m not interested in logging it. I got a tax advantage obviously, from a conservation easement but the land trust and I have not exactly figured out or really tried too hard to figure out how to conserve a forest for the future.”



Participant clearing trees

They are active DIYers. They are purchasing equipment, thinning, raking, using burn piles and prescribed fire, chipping, clearing paths and fixing roads, tackling invasive species, and creating defensible space around their homes and cabins AND paying for all of these activities mostly out of their own pockets. *“I like to be outdoors doing stuff, whether it’s with a Pulaski, machete, chainsaw or clippers.”*

They need help. They sign up for the Forest Stewardship Workshops to gain foundational knowledge and understanding of next steps, but there is so much more assistance they are asking for.

“You know, we were just so overwhelmed with the trauma of the fire, and just functioning. I mean we didn’t live in our house for two months, and you know, we just worked our fingers to the bone to rebuild the water system and clean and be able to move back in. So, we needed somebody to just be more specific about, ‘this is something you can do, this will help you’, but we’ll muddle through and it’s okay.”

Additional findings will be discussed in a separate report in Spring 2022.

Collaboration

Forest stewardship workshops are held in collaboration with local, state and federal governments, community-based organizations, nonprofits and private industry partners including the Natural Resources Conservation Service, Resource Conservation Districts, Fire Safe Councils and Cal Fire. Workshop partners have participated on planning committees, provided location and logistical support, given presentations, participated in group breakout sessions, and assisted workshop participants in plan development. This collaboration allows participants to share knowledge and develop relationships with local agencies and professionals. Participants rely on these relationships with RPFs to develop their forest management plans and use the contacts they've made with Cal-Fire and RCDs to then apply for CFIP and EQIP cost-share opportunities. Many thanks to our steering committee of leaders from partner organizations that give input on implementation of the initiative. We meet every other month to review progress and get advice on next steps. Thanks to 2021 Steering Committee members:

- Larry Camp – Forest Landowners of California
- Kevin Conway- Cal Fire
- Tracy Katelman – ForEverGreen Forestry
- Max Odland – California Association of RCDs
- Jason Wells – Sonoma County RCD
- Martin Twer – The Watershed Research and Training Center



Tracy Katelman, left, ForEverGreen Forestry, helping participants at the Sonoma field day



About the Initiative: The Forest Stewardship Education Initiative was developed based on a recommendation by the Forest Management Task Force's Forest Landowner Outreach and Education Working Group. Cal Fire contracted with Forestry Advisor Susie Kocher sdkocher@ucanr.edu (Registered Professional Forester #2874) and Program Coordinator Kim Ingram, kcingram@ucanr.edu, to develop and implement the program. The workshops began in January 2020. Through a contract extension with Cal Fire, the program will continue through June 30, 2024. The workshop series is supported by UC ANR Forestry Advisors Mike Jones mjones@ucdavis.edu, Ryan Tompkins retompkins@ucanr.edu, Rick Satomi rpsatomi@ucanr.edu and Yana Valachovic yvala@ucanr.edu. For more information, see <http://ucanr.edu/forestryworkshops/>.

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- Promote economic prosperity in California
- Protect California's natural resources
- Build climate-resilient communities and ecosystems

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