



## Criteria and Compliance – Field Review Checklist

Property Name: \_\_\_\_\_

Date of Field Review: \_\_\_\_\_

Field Review Team Leader: \_\_\_\_\_  
(Name)

Field Review Team Members: \_\_\_\_\_  
(Name)  
\_\_\_\_\_  
(Name)

Model Forest Manager: \_\_\_\_\_

Present at Field Review: \_\_\_\_\_ (Name)

Model Forest Manager: \_\_\_\_\_

Present at Field Review: \_\_\_\_\_ (Name)



## Model Forest Program Criteria - Checklist

### I. A Model Forest must demonstrate alignment with the Guild Principles.

**Reviewer’s Guidance:** While these criteria will be somewhat subjective, Model Forest Candidates will be asked to self-review their model forest designation in light of the Forest Guild Principles. Reviewers will also consider the candidate forest in light of Forest Guild Principles – with evidence and compliance activities appropriate to the scale and complexity of the forest and its ownership. Reviewers are encouraged to identify and cite examples of compliance with Guild Principles, including but not limited to those listed here as examples.

Principle 1: *The well-being of human society is dependent on responsible forest management that places the highest priority on the maintenance and enhancement of the entire forest ecosystem.*

Examples for demonstrating compliance:

- Forest management objectives prioritize ecosystem functions
- Forest management activities include models of ecosystem maintenance and enhancement
- Forest management includes practices that are restorative of natural forests

<b>Meets Criteria:</b> _____ / <b>Fails Criteria:</b> _____ <b>Cannot Currently Evaluate Criteria:</b> _____  Comments: _____  Additional Information Requested: _____
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Principle 2: *The natural forest provides a model for sustainable resource management; therefore, responsible forest management imitates nature's dynamic processes and minimizes impacts when harvesting trees and other products.*

Examples for demonstrating compliance:

- Silviculture systems imitate nature’s dynamic processes through practices such as harvest design, tree selection, understory treatments, the use of fire as a management tool, herbivore control, and other methods
- Management activities use effective protections for water quality, soils, and other natural resources
- Guidelines exist and are used for the harvesting of non-timber products
- Forest management addresses invasive species threats if warranted
- Forest management plan contains a natural history component

<b>Meets Criteria:</b> _____ / <b>Fails Criteria:</b> _____ <b>Cannot Currently Evaluate Criteria:</b> _____  Comments: _____  Additional Information Requested: _____
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**Principle 3:** *The forest has value in its own right, independent of human intentions and needs.*

Examples for demonstrating compliance:

- The forest management plan articulates the additional values that are being protected and/or enhanced
- Forest management activities include non-commercial treatments and investments
- Forest management includes activities to appropriately enhance wildlife habitats and/or micro-climates that support unique plant species
- Forest management program protects public benefits such as water quality, wildlife habitat, biodiversity, and hydrologic functions.

<b>Meets Criteria:</b> _____ / <b>Fails Criteria:</b> _____ <b>Cannot Currently Evaluate Criteria:</b> _____  Comments: _____  Additional Information Requested: _____
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**Principle 4:** *Human knowledge of forest ecosystems is limited. Responsible management that sustains the forest requires a humble approach and continuous learning.*

Examples for demonstrating compliance:

- Forest manager and landowner demonstrate a commitment to continuous learning activities
- Active participation in Guild meetings, events, and/or discussions
- Management activities are done thoughtfully, with consideration of alternatives, and in consultation with other land managers or mentors
- Model forest includes a monitoring component of permanent plots.

<b>Meets Criteria:</b> _____ / <b>Fails Criteria:</b> _____ <b>Cannot Currently Evaluate Criteria:</b> _____  Comments: _____  Additional Information Requested: _____
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**Principle 5:** *The practice of forestry must be grounded in field observation and experience as well as in the biological sciences. This practical knowledge should be developed and shared with both traditional and non-traditional educational institutions and programs.*

Examples for demonstrating compliance:

- Education events are hosted and/or supported by the model forest
- Education is accessible to diverse interests and non-discriminatory
- Partnerships are established with educational and/or research institutions, programs, or individuals to pursue shared learning opportunities

<b>Meets Criteria:</b> _____ / <b>Fails Criteria:</b> _____ <b>Cannot Currently Evaluate Criteria:</b> _____  Comments: _____  Additional Information Requested: _____
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Principle 6: *A forester's or natural resource professional's first duty is to the forest and its future. When the management directives of clients or supervisors conflict with the Mission and Principles of the Guild, and cannot be modified through dialogue and education, a forester or natural resource professional should disassociate.*

Note: The First Duty Principle creates an especially important obligation for Guild members managing Model Forests, whose owners will typically be either their clients or their supervisors. If circumstances occur in a Model Forest which conflict with the First Duty Principle, Model Forest Managers must be prepared to disassociate, and notify the Guild of the situation for possible revocation of Model Forest designation.

Examples for demonstrating compliance:

- The forester is a member of the Guild and committed to the Guild Principles as demonstrated by staying current with membership dues, supporting regional activities, and participating in the national events whenever possible

<p><b>Meets Criteria:</b> _____ / <b>Fails Criteria:</b> _____</p> <p><b>Cannot Currently Evaluate Criteria:</b> _____</p> <p>Comments: _____</p> <p>Additional Information Requested: _____</p>
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**II. Model Forest management should be guided by a comprehensive written forest management plan.**

**Reviewer’s Guidance:** The forest management plan(s) will be a primary tool for communicating the goals and objectives of ownership, methods of management, attention to multiple resource values, and overall compliance with Guild principles. Forest management plans can take many forms. An acceptable forest management plan may be one single document produced by the Guild Model Forest Manager, or may include a combination of supporting documents such as regionally specific resource management or forest health guides produced by third parties, together with simple management schedules prepared by the Model Forest Manager. Reviewers are encouraged to be flexible in considering the format and level of detail needed to meet the criteria and minimum elements of forest management plans.

The forest management plan and/or supporting documents should at a minimum address (Check all that apply):

- Identification information, including:
  - Landowner name and address, name of plan preparer, legal description and/or property description, acres covered under plan, timeframe covered by plan, landowner(s) signature
- Goals and objectives of ownership
- Number of acres under management
- Maps of management units at an appropriate level of detail
- Descriptions of forest or vegetation types under management.
- Forest reconnaissance of units at an appropriate level of detail
  - Timber cruise of actively managed forested management units
  - Vegetation description of non-forest units
- Identification of ecologically unique areas, sensitive areas, significant cultural resource areas, or threatened and endangered species locations
- Explanation of silvicultural methods and systems used, and description of other active management practices used.
- A description of forest health and invasive species threats specific to the property or region with applicable guidance for active management.
- Description and management considerations for endangered resources, high-conservation value forests, or non-timber resources identified as priorities in ownership objectives.
- A schedule of management practices appropriate to the scale and complexity of ownership.
  - Smaller properties may include a simple practice list by year.
  - Larger properties may include a stand inspection or entry list, tied to descriptions of management practices and silvicultural methods used by forest type.
  - Management practices schedules should include at least 10 years worth of planned activities.

<p><b>Meets Criteria:</b> _____ / <b>Fails Criteria:</b> _____</p> <p><b>Cannot Currently Evaluate Criteria:</b> _____</p> <p>Comments: _____</p> <p>Additional Information Requested: _____</p>
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**III. Forest is under stable ownership with evidence of transparent decision making, and Model Forest Owners are willing to commit to the Model Forest Program.**

**Reviewer’s Guidance:** Reviewers must be able to determine that ownership and management authority of the candidate property is stable and will contribute to the ability to achieve long-term management and demonstration values inherent in a Guild Model Forest. Reviewers should also be aware of how management decisions are made on the property to ensure that it is appropriate to the type of ownership, and management decisions respect the owner’s true intent. For purposes of the Model Forest program, a single individual (either an owner or the owner’s formally designated representative) must be designated as the Model Forest Owner.

- ❖ A minimum 10 years of continuous ownership by the current owner is required for all candidate forests.
- ❖ There should be evidence of the intent of owners to maintain ongoing ownership and management control of the property.
  - Properties under conservation easement or other formal dedication to natural resource protection are preferred.
  - Model Forest Owner’s investment in ‘capital’ projects such as long-term management plans, professional management services, or forest infrastructure is evidence of ongoing ownership intent.
- ❖ There should be evidence of decision making transparency and accountability appropriate to the type of ownership.
  - Joint-ownership properties should evidence regular communication and consensus-based decision making among owners.
  - Multiple owner clubs, large family trusts, or non-profit ownerships should demonstrate a transparent decision making process that includes opportunity for input of all owners or stakeholders into major management decisions at an appropriate level, without overly constraining the need to execute projects smoothly.
  - Public properties shall demonstrate a process for regularly gathering public input at appropriate points in the planning process and using that input to meaningfully inform management plans.
  - Existence of a standing land management advisory committee on public forests or non-profit owned forests is considered a positive indication of accountability.
- ❖ The Model Forest Owner has signed a written agreement with the Model Forest program, including adherence with program criteria, and a minimum commitment to hosting at least one public demonstration event each year, coordinated with the Forest Guild for programmatic purposes.
  - In the case of multi-owner properties all owners, or the appropriate decision making entity or committee must have approved the designation.
  - In the case of public properties the approval or endorsement of any existing advisory committees or other stakeholder groups for Model Forest designation and those groups participation in promoting the program and events is strongly encouraged.

<p><b>Meets Criteria:</b> _____ / <b>Fails Criteria:</b> _____</p> <p><b>Cannot Currently Evaluate Criteria:</b> _____</p> <p>Comments: _____</p> <p>Additional Information Requested: _____</p>
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**IV. The forest is under professional management, ensuring that both the owner’s long-term goals and the demonstration objectives of a Guild Model Forest can be achieved.**

**Reviewer’s Guidance:** Reviewers should be aware that forest managers will be key players in ensuring the success of a Guild Model Forest. Professional managers will often be the most visible part of the team promoting a Model Forest to the public. Inadequate or unprofessional management of a Model Forest will place the Guild and its reputation at risk. For purposes of the Model Forest, program a single individual must be designated as the Model Forest Manager.

- ❖ The Model Forest Manager must be a Forest Guild Professional Member in good standing. If forest management is the responsibility of a team – such as is the case with a larger consulting firm, or a public forest, a resource professional with primary land management responsibilities must be designated as the Model Forest Manager, and must be a Guild Professional Member in good standing.
- ❖ The Model Forest Manager must have significant experience with the predominant forest types on the forest, and must have expertise appropriate to the size and complexity of the ownership.
- ❖ The Model Forest Manager will be the primary point of contact for the Guild regarding the Model Forest. The Model Forest Manager agrees to notify the Guild of any change of circumstances at the Model Forest that would warrant re-review of the designation. Changes that would warrant Guild notification would include:
  - Change in ownership.
  - Change in overall management intent.
  - A fundamental change in the property management plan.
  - Activities or circumstances that would significantly alter the outcome of a Model Forest criteria review.
  - Circumstances that would affect the ability of the Guild to meet our program goals and purposes for the Model Forest program.
- ❖ The Model Forest Manager has signed a written agreement stating their adherence to the Model Forest program criteria, promoting the Forest Guild and the Model Forest Program overall, and in taking the primary role in promoting and coordinating with the Model Forest Owner and the Forest Guild at least one public event per year on the designated Model Forest.

<p><b>Meets Criteria:</b> _____ / <b>Fails Criteria:</b> _____</p> <p><b>Cannot Currently Evaluate Criteria:</b> _____</p> <p>Comments: _____</p> <p>Additional Information Requested: _____</p>
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**V. The Forest has Reasonably High Demonstration Value**

**Reviewer’s Guidance:** The Guild has a finite ability to invest in and support Model Forest designations, and we are seeking to maximize that investment by accepting Model Forests that have the highest potential to meet our program goals. The weight given to various factors in evaluating demonstration value will be unique to the region where the property occurs, and will be influenced by landscape factors, predominant forest practices, and ownership types of the surrounding area.

As indicated in the Model Forest vision statement, the Model Forest Program provides a model for the places, people, and relationships that foster sustainable forest management. Demonstration activities on the property should highlight and celebrate those relationships.

- ❖ The forest and areas under management must be reasonably accessible to groups. Where possible, consideration should be given to affording access to actively managed areas for persons with limited abilities. The property layout should allow for provision of facilities for group outdoor events and activities.
- ❖ Management practices on the property should have significant educational value. While management practices that embody Guild principles and that can be adopted by other owners will usually have high demonstration value, not all practices need to be adoptable by all other forest owners. Model Forests with non-typical ownership objectives or with unique resources demonstrating unique practices may also have demonstration value in raising awareness of natural resource needs in the region.
- ❖ Management practices applied on the property must be sufficiently well executed to be considered by the reviewers as successful applications of silviculture, including but not limited to weeding, cleanings, thinning, and the establishment/release of regeneration as prescribed in the management plan.
- ❖ Practitioners should be able to demonstrate the ability to adapt their management to unforeseen events. Creating learning and demonstration opportunities from unintended outcomes should be encouraged.
- ❖ The Model Forest and its demonstration program should provide the opportunity to showcase the work of all partners involved in forest management including: Model Forest Owners; Forest stakeholders on public lands; Guild Model Forest Managers; Other resource professionals who contribute to planning or activities; Logging professionals; Forest stewardship workers; Other partners such as land trust staff, active friends, etc.

<p><b>Meets Criteria:</b> _____ / <b>Fails Criteria:</b> _____</p> <p><b>Cannot Currently Evaluate Criteria:</b> _____</p> <p>Comments: _____</p> <p>Additional Information Requested: _____</p>
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**Field Review Team – Final Recommendation**

\_\_\_\_\_ **Consensus Recommendation for Model Forest Designation**

\_\_\_\_\_ **Majority Recommendation for Model Forest Designation**  
Member(s) Recommending Approval: \_\_\_\_\_  
Member Recommending Denial: \_\_\_\_\_

\_\_\_\_\_ **Recommendation for Denial of Model Forest Designation**  
Member(s) Recommending Denial: \_\_\_\_\_  
Member Recommending Approval: \_\_\_\_\_

Comments for approval or denial of recommendation: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Minority opinion by member opposed to majority decision: \_\_\_\_\_  
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\_\_\_\_\_  
\_\_\_\_\_

(Name)

**Signatures of Review Team Members:**

\_\_\_\_\_  
(Name) (Date)  
  
\_\_\_\_\_  
(Name) (Date)  
  
\_\_\_\_\_  
(Name) (Date)