

**Department of Natural Resources
Division of Forestry – Bureau of Forestry Field Operations
Chapter 1, Private Forestry Handbook 2470.5**

Stakeholder Comment & Response Summary

Why did we update the handbook?

Chapter 1 of the Private Forestry Handbook covers program guidelines for DNR Integrated Service Forestry Staff in their work with private woodland owners. The primary reason Chapter 1 was updated was to establish a property walk-through policy since one did not previously exist. Very few revisions to the chapter occurred, the majority of the update was new content. All changes/additions are highlighted in yellow for the purpose of the review process; however, upon publishing this will be considered a full chapter rewrite and all yellow highlighting will be removed.

Summary of process

Chapter 1 was posted for 21-day stakeholder input from March 15 through April 4, 2022. DNR staff were notified through the Department's internal newsletter and more specifically through the Division of Forestry's internal newsletter. External stakeholders were notified via the Division of Forestry Stakeholder Input Opportunities for Forestry Documents webpage and via direct emails where appropriate.

Summary of Comments

The Department extends its sincerest thanks and appreciation to those who provided comment and feedback on the proposed changes. A total of four individuals/organizations provided comments on the draft Chapter. The comments can be summarized as follows. A complete list of all comments can be made available upon request.

- Update links to administrative code
- Clarify intent and wording when referencing administrative code
- Provide more robust reference to services partners provide and recognition of partners with which the Department has agreements (MOUs) with
- Clarify how foresters should manage walk-through requests from all partner groups, not just some
- Clarify what partner materials are available for foresters to provide to landowners
- Clarify that landowner follow up is not limited to phone calls

PROGRAM GUIDELINES

INTRODUCTION

This handbook provides guidelines to be followed in forest management assistance to private landowners and in related cooperative efforts with partners including other agencies, non-governmental organizations and private enterprises. It gives instructions to implement the program policies, priorities, limitations, exceptions and prohibitions that are outlined in s. [NR 1.21](#), Wis. Adm. Code (~~see Supplemental Information~~).

POLICY

As described in s. [NR 1.211](#), Wis. Adm. Code, the Department's goal is to provide administration and leadership that promotes sustainable forestry for multiple benefits (including timber, fish and wildlife, threatened and endangered species, natural communities, soil and water protection, recreation and aesthetics) to private landowners and the citizens of the state.

PRIORITIES

The priorities listed in s. [NR 1.212](#), Wis. Adm. Code, are directed at assistance to private landowners. Other Department programs, assignments, duties in position descriptions, Secretary's objectives, etc. must also be taken into account when scheduling work.

An important concept to recognize in ss. [NR 1.212\(1\) and \(2\)](#) is that services from Department foresters are part of a larger **private forestry assistance network** in Wisconsin. The rule establishes work priorities for Department foresters to make the most efficient use of their time in concert with private forestry assistance available from others in the network. The rule lays out the means by which the Department can achieve the goal of sustainable forestry on private lands. ~~Priority 1 activities are services that the public generally relies on Department foresters to provide, while priority 2 activities are important services that partners may be in a better position to supply.~~

The order of priority 1 and 2 activities in the rule is significant and should play a role in annual work planning. Foresters and supervisors should, however, also be practical in scheduling and mixing tasks in consideration of statutory mandates or deadlines, seasonal needs, weather, availability of other resource professionals or other factors. It is not the intent of the rule that all priority 1a tasks be done before proceeding to priority 1b, etc., or that all priority 1 activities be completed before doing those listed under priority 2.

Department foresters should direct ~~landowners people~~ seeking assistance to other resources (for example, services offered by cooperating foresters ~~and partners~~) if they cannot provide those services on a timely basis. That concern is especially acute for priority 1a (initial contacts for management guidance) and priority 1b (timber sale guidance) requests. Landowners who do not get prompt help in these situations might lose interest in pursuing sound management or take uninformed action that could ~~damage the resource~~ lead to unsustainable forest management.

Foresters who cannot respond to demands within time periods they and their clients are comfortable with should make referrals immediately or seek assistance through their forestry team leader. ~~For additional information about handling requests, see Chapter 20.~~

Foresters should also be aware of the Department's various partnerships with landowner assistance groups, some of which the Division of Forestry has a Memorandum of Understanding (MOU) or other formal agreement with. These formal partnerships and MOUs are available for all staff to view on the Division of Forestry intranet under "Private Forestry". Utilizing these partnerships to best serve the landowner in meeting their goals and objectives for sustainable forestry management is the purpose of these alliances.

LIMITATIONS, EXEMPTIONS, PROHIBITIONS

Section [NR 1.212\(3\)](#) itemizes limitations, exemptions and prohibited services.

Department foresters may not provide a landowner more than three workdays (24 hours) of technical forestry assistance in a

calendar year. That does not mean that landowners have a right to expect or demand that level of service. Foresters should consider other requests and priorities and strive to provide quality service to as many landowners as reasonable.

The other work limitations in the rule focus on timber sale assistance, which are covered in Chapters 10 and 30 of this Handbook.

Exemptions to the three-day service limit are allowed for work related to administration of federal cost-sharing incentive programs and assistance to other units of government (as time and priorities allow).

The rule lists specific services that Department foresters may not provide, including:

1. Appraisals of forest land, timber, timber damage, or right-of-ways. This prohibition does not preclude Department foresters from providing general information on established stumpage values and current market trends.
2. Timber sale boundary establishment other than with a hand compass.
3. Private boundary line establishment by any means.
4. Preparation or enforcement of timber sale contracts other than providing an approved sample contract form.
5. Investigation or involvement with civil trespass, other than when investigating for a violation of ch. 26, Wis. Stats.
6. Shearing of Christmas trees except for instructional or educational purposes.
7. Arboriculture and tree-trimming.
8. Performing cultural practices or tree planting except for instructional or educational purposes.
9. Scaling cut forest products except for instructional or educational purposes.

OUTSIDE EMPLOYMENT

Department staff should be aware of outside employment rules found in Manual Code 9103.21 (see Supplemental Information). The Manual Code details the circumstances under which agency personnel are permitted to engage in forestry-related outside employment. The rule requires *prior approval* by the Bureau of Human Resources, in conjunction with the Bureau of Legal Services and the Division of Forestry, for permitted outside employment activities. The purpose of the rule is to avoid any actual or perceived conflicts of interest.

LANDOWNER CONTACTS & PROPERTY WALK-THROUGH POLICY

SERVICING LANDOWNER CONTACTS

Respond in a timely fashion to all landowner contacts.

During an initial conversation with a landowner the forester is expected to ask how the landowner came to contact them (“How did you learn about DNR’s Private Forestry Assistance Program?”, “How did you come to contact DNR Forestry?”, etc.). The landowner’s response to this question shall be logged in the Private Forest Landowner Database.

Why?

This information is critical to help the Private Forestry Program understand 1) in what ways private woodland owners learn about the availability of DNR Foresters to assist them, and 2) the success of our marketing/outreach methods.

Determining how to service a landowner contact

Evaluate the landowner contact and determine the appropriate way to service the contact. Think critically about the information the landowner has shared (about their property, the service they are looking for, etc.), and be sure to consider the following **guiding principles** to better understand whether an integrated service forestry staff or a tax law specialist should assist the landowner.

- 1) ***Focus on the landowner’s request***

A woodland owner whose land is enrolled in a tax law program does not necessarily mean that a tax law specialist will assist that landowner. Depending on what the landowner is asking for specifically, it could be that integrated service forestry staff may assist the landowner, or it could be a tax law specialist, or both. While it may be helpful to understand if a woodland owner is participating in a program such as tax law, it is more important to understand what the woodland owner is looking for; doing so will help determine and guide who (integrated service forestry staff or tax law specialist) will assist them with their request.

Focusing on the landowner's request should allow the woodland owner to be connected with the appropriate resource. However, it is understood that discretion may be used in determining who will service a landowner request based on:

- availability or location of staff
- nature of the request
- complexity of the request
- convenience for the customer if the request is fairly simple and could be handled at that moment

What if you can't define the landowner's request?

If the ask remains unclear even after a discussion with the landowner and the landowner is not enrolled in MFL, they should be connected to the appropriate integrated service forestry staff.

If the ask remains unclear even after a discussion with the landowner and the landowner is enrolled in MFL, they should be connected to the appropriate Tax Law Forestry Specialist (TLFS).

Integrated Service Forestry Staff should not be performing field visits for MFL landowners unless the landowner has a clear ask for a service that Integrated Forestry Staff provide (e.g. WFLGP). If at all possible, ascertain the landowner's request via phone or email to start.

A clear understanding of the landowner's request is critical in determining the appropriate service response. If at all possible, confirm the service request via a phone discussion before completing any field work to include a walk through.

2) ***Ensure coordination and good communication across program functions***

Good communication is essential because often times both a tax law specialist and an integrated service forestry staff may be working with the same woodland owner. Not only is it important to understand each other's role (who should service which request), it is equally important that staff are clearly communicating and coordinating efforts with each other when assisting woodland owners. "[It's a We Thing](#)" that ensures customer service is a top priority.

A woodland owner may work with their "main" DNR Forestry contact(s), but they may also work with a Cooperating Forester, Certified Plan Writer, DNR Wildlife Biologist, NRCS Conservationist, etc. We all share in the responsibility to move private woodland owners along a continuum of engagement toward completion of on-the-ground stewardship activities on their woodland.

3) ***Understand integrated service forestry work and tax law work***

Integrated service forestry staff are integrated foresters and technicians who have private forestry in their position description. They are often times the initial contact for a woodland owner. Generally speaking, the role of integrated service forestry staff is to provide professional planning and technical advice to Wisconsin's woodland owners. Doing so requires the integrated service forestry staff to:

- have expertise in the Wisconsin Forest Landowner Grant Program (WFLGP) including review and approval of applications, practice implementation and payment requests;
- have a broad understanding of the Managed Forest Law (MFL), Environmental Quality Incentives Program (EQIP), Conservation Stewardship Program (CSP), Conservation Reserve Program (CRP), and various other programs (both technical and financial, state and federal) available to woodland owners;
- facilitate participation in those programs;
- educate woodland owners about forest management practices;

- build relationships with woodland owners and partners; and
- connect woodland owners to the resources they need to implement forest management activities.

Common work responsibilities performed by integrated service forestry staff are those activities outlined in the Division's work planning documents, including walk-throughs, state/federal financial assistance programs, private landowner outreach, tree planting assistance, stewardship plan writing, etc.

Tax law specialists are experts on the MFL and Forest Crop Law (FCL) programs. Their role is to implement the policies and procedures administering the tax law programs. Tax law specialist will refer new unengaged landowners to integrated service forestry staff for initial contact and potential property walk-through. See section below on "Evaluating a Request for a Walkthrough". Work responsibilities commonly performed by tax law specialists include:

- serving as a point of contact for MFL/FCL landowners,
- reviewing and approving MFL applications and management plans,
- assisting with completion of tax law forms (Transfers, Withdrawals, etc.),
- evaluating cutting notices,
- providing tax law forest management guidance, which includes developing and updating management objectives and conducting office and site visits,
- completing NHI and archaeological/historical searches for cutting notices, and
- referring tax law landowners to Cooperating Foresters for more detailed services.

DRAFT

The following two pages contain tables of scenario-based examples and task-based examples to better illustrate the relationship and differences between integrated service forestry work and tax law work. **Important:** the tables do not represent all possible scenarios but provide some of the most common examples. If you have questions, reach out to your immediate supervisor.

SCENARIO-BASED EXAMPLES	
Focus on the Request	Who Should Assist the Landowner
Site visit regarding implementation of an MFL mandatory practice.	Tax Law Specialist
Tax Law landowner looking for a WFLGP grant to implement a <u>non-mandatory</u> practice.	<p>Integrated Service Forestry Staff would primarily assist the landowner and approve/process the WFLGP application and payment request.</p> <p>Typically, the Integrated Service Forestry Staff would do any necessary field work, unless the Tax Law Specialist is already at the property for tax law administration.</p> <p>Integrated Service Forestry Staff should consult with the Tax Law Specialist throughout the WFLGP process to ensure tax law compliance is maintained.</p>
Tax Law landowner looking for a WFLGP grant to implement a <u>mandatory</u> practice.	<p>The Tax Law Specialist is responsible for first working with the landowner to develop an approval practice proposal. The Tax Law Specialist will then connect the landowner to the Integrated Service Forestry Staff who would assist the landowner by sharing WFLGP information and approving/processing the WFLGP application and subsequent payment request. In most cases, the Tax Law Specialist would do all of the associated field visits.</p> <p>Collaboration between the Tax Law Specialist and the Integrated Service Forestry Staff is critical from start to finish to ensure the mandatory practice is fulfilled correctly and to track critical timelines collaboratively.</p>
Property visit (walk-through) from an “unengaged” woodland owner who <i>may</i> be interested in MFL.	Integrated Service Forestry Staff would assist this landowner to explain the full suite of options available to the landowner. Calling the landowner prior to the visit may help to clarify the landowner’s interest and could lead to a direct referral to a CPW without the need for the Integrated Service Forestry Staff to conduct a walk-through. The Tax Law Specialist would become engaged upon review/approval of the MFL application.
During a meeting/field visit with a Tax Law Specialist, the landowner expresses interest in signing up for WFLGP.	<p>Since the Tax Law Specialist is already meeting with the landowner, and since filling out an application for WFLGP takes only a few minutes, this is a task the specialist could readily assist the woodland owner with. Once the application is filled out, the tax law specialist should submit the application to the integrated service forestry staff who would handle processing the application and payment request.</p> <p>Consultation between the Tax Law Specialist and Integrated Service Forestry Staff is critical.</p>
Cooperating Forester requests NHI information for a non-tax law property.	While that may appear on its face to be an integrated service forestry staff responsibility, a decision has been made that tax law administration specialists will service these requests based on the ease for the Cooperator, the fact that it’s not a complex request, that it is a fairly low workload, etc.

(continued on next page)

TASK-BASED EXAMPLES		
Tasks/Requests	Integrated Service Forestry Staff	Tax Law Specialist
NHI, archaeological, historical searches for MFL/FCL Cutting Notices		X
General assistance with tax law forms/orders		X
Updating MFL maps		X
Guidance on MFL/FCL land management & mandatory practices, including site visits		X
Review/Process Cutting Notices & Reports		X
Site visits on tax law lands for tax related tasks (e.g. fencing question – a potential eligibility issue)		X
Review/Process MFL applications		X
Tree Farm activities for MFL Certified Group		X
Guidance on <u>general</u> tax law program questions	X	X
Guidance on <u>general</u> private service forestry program questions	X	X
Provide <u>general</u> DMAP information	X	X
DMAP Site Visits with Wildlife Biologist	X	
Assistance completing WFLGP application (generally integrated service forestry staff)	X	X
Tree planting & reforestation plans	X	X
Approve WFLGP applications and payment requests	X	
CRP, EQIP, CSP administration including site visits	X	
Tree Farm activities for non-MFL properties	X	
Stewardship plans, practice plans, basic plans (i.e. non-tax law management plans)	X	
Timber sale establishment	X	
Public/landowner education & outreach	X	
Property walk-through non-MFL	X	

After evaluating the landowner contact and considering the guiding principles, keep in mind the possible ways to service a landowner contact, which include (but are not limited to):

- Connecting the landowner with another natural resource professional. This could include connecting a homeowner with questions about their yard trees to a Certified arborist or UW-Extension, a landowner concerned about dying trees in their woodland to a DNR Forest Health Specialist, a landowner with specific wildlife questions to a DNR wildlife biologist, etc.
- Providing the landowner information whether a publication, partner resources or websites, website to visit (e.g. www.mywisconsinwoods.org), local workshops to attend, educational opportunities, etc. Refer to the Forester Toolkit and the Division of Forestry intranet under “Private Forestry” for available resources.
- Scheduling a walk-through to visit with the landowner on their property.

Tracking landowner contacts

Landowner-initiated contacts shall be logged in the Private Forest Landowner Database along with the landowner’s contact information (if provided). Logging the contact in the Database is required when the landowner owns at least 10 acres of woodland and is not currently enrolled in MFL. When logging this information into the database, it is also expected that information about the plan to address the landowner’s needs/concerns is also entered.

Why?

Not only will this information be helpful so that the forester can create a new electronic landowner file, but this information will also provide the Private Forestry Program with the ability to potentially market to these landowners in the future. Refer to Chapter 20 of the Private Forestry Handbook for more information about maintaining office records and creating files for landowners given assistance.

EVALUATING A REQUEST FOR A WALK-THROUGH

If a landowner has specifically requested a walk-through, generally all walk-throughs requests from “unengaged”, non-MFL landowners should be serviced. The highest priority walk-throughs (i.e. the requests that should be serviced first) include:

- Walk-through requests generated from an active outreach campaign (e.g. statewide/local marketing efforts, etc.)
- Walk-through requests generated from active partner initiatives (e.g. Wisconsin Woodland Owners Association, My Wisconsin Woods, Wisconsin Young Forest Partnership, UWEX Learn About Your Land, etc.)
- Walk-through requests where a landowner is actively pursuing a timber harvest
- Walk-through requests involving a potential timber trespass
- Walk-through requests for parcels ≥ 10 acres

Requests for walk-throughs on parcels less than 10 acres should be evaluated by the receiving forester/technician. In some cases, a walk-through is not warranted on small parcels, but keep in mind that the landowner contact can still be serviced per the guidance above (connecting the landowner with another professional, providing them with information, etc.).

Examples of when a forester/technician might do a walk-through on a parcel less than 10 acres:

- High-value timber stand, e.g. Walnut
- Property adjacent to other larger tracts, where pairing up timber sales might be an option
- Forester/technician currently has a low workload
- Landowner is highly motivated to take action

Examples of when a forester/technician might not do a walk-through on a parcel less than 10 acres:

- Backyard/urban landowner
- Forester/technician currently has a full workload

If a walk-through is warranted, schedule the walk-through as soon as possible, factoring in current workload, commitments and deadlines. Remember that walk-throughs are a high priority work item for integrated foresters/technicians. Be sure to follow the Property Walk-through Policy outlined on the following pages.

Walk-through service standards

Walk-throughs must be ‘scheduled’ within two weeks (14 business days) three weeks of the request being received (either directly from the landowner, from a partner group or other organization or via the Database). ‘Scheduled’ means the forester

has reached a mutually agreed-upon date with the landowner to conduct the walk-through. 'Scheduled' does not mean the walk-through has to be conducted within ~~two~~ three weeks of being notified of the walk-through request.

Integrated Team Leaders will be responsible for the supervision, monitoring and performance of their direct reports to ensure this service standard is met (e.g. landowner contacts are being made, walk-throughs are scheduled and completed). The Database can/will generate reports sent directly to Team Leaders at regularly scheduled intervals (e.g. daily, weekly, monthly) as an accountability measure to further ensure these service standards are being met. Private Forestry Program staff (i.e. bureau staff) will also periodically monitor the Database to evaluate progress and may follow-up directly with Team, Area, or District Forestry Leaders when the service standards are not being followed.

Walk-through requests generated from outreach campaigns/partner initiatives via the Private Forest Landowner Database

Landowner walk-through requests resulting from ~~private forestry~~ certain education and outreach initiatives (e.g. My Wisconsin Woods, UWEX Learn About Your Land, etc.) will be transferred into the Private Forest Landowner Database at the time a landowner agrees to be contacted by and/or requests a walk-through from a DNR Integrated Forester. When the landowner walk-through request is transferred into the Database, additional information about the landowner, their parcel/forest land, and potentially the landowner's availability (best times for the forester to call or best times to schedule the walk-through) will also be transferred into the Database. At that time, the assigned forester (based on integrated work areas) will receive an auto-generated email notification indicating the landowner has requested a walk-through.

Walk-through requests that do not come via the Private Forest Landowner Database

Foresters are responsible for adding walk-through requests to the database when they come through a partner group or other organization who are not connected to the database (e.g. WWOA, Land Conservation Activity Network, etc.) or when landowners reach out to foresters directly. The ~~14-day~~ three-week (15-day) service standard applies to all walk-through requests regardless of what organization they originate from or how they are presented to the forester.

Foresters should recognize that in some cases it will take multiple attempts to contact the landowner to schedule the walk-through (see diagram on following page). Use of various methods of contact (e.g. phone, email, mail) to schedule the walk-through may be required.

Foresters must regularly update the Database with important landowner information in a timely manner. This includes but is not limited to: date walk-through was scheduled for, date walk-through was completed, follow-up actions by the landowner, etc.

Foresters are responsible for adding landowners to the database who do not request a walk-through as part of an outreach campaign/initiative, but who contact the forester directly. Foresters must regularly update the Database with important landowner information in a timely manner. This includes but is not limited to: date walk-through was scheduled for, date walk-through was completed, follow-up actions by the landowner, etc.

PROPERTY WALK-THROUGH POLICY

The property walk-through is typically the first time a forester and a landowner meet face-to-face. It is the forester's opportunity to establish a trusting relationship with the landowner. By practicing **active listening** and communicating effectively, the forester will begin to gain an understanding of the landowner's goals and interests for their property. A successful walk-through will positively impact both initial impressions and ongoing interactions.

Generally, all the steps below should be followed, but in some instances all steps may not be needed.

Prepare for the walk-through

During the initial phone call with the landowner, collect the basics: information about the property and when/where to meet. But it is also important to use that time on the phone to find out what prompted the landowner to call, and what their concerns or goals for their property are. Remember, this is the first opportunity to make a good impression and begin to develop a positive relationship. By gathering this information during the initial phone call, the forester can come to the walk-through prepared with an understanding of the landowner's goals and interests, as well as an understanding of the concerns the landowner may have in managing their property.

During the initial phone call, the forester is encouraged to use the **Landowner Profile Form** (available in the Forester's Toolkit) as a tool to gather information about the landowner and their property.

Landowner Profile Form

The Landowner Profile Form is a tool for the forester to use to gather information about the landowner and their property. While it is encouraged to be used when preparing for a walk-through, the information on the form shall be collected at some point during your engagement with the landowner, whether before, during or after a walk-through.

Although the questions on the form are phrased as if you were asking them to the landowner directly, the form is not intended to be used as a script that you must robotically use when you talk with a landowner. The form is also not to be mailed to the landowner for them to fill out. The form is intended solely as a tool for the forester. The intent is for you to have this form available, whether on paper or at your computer, so that you can enter information about the landowner and their property as you collect it. The form can also be useful during a conversation with the landowner when needed to stimulate discussion or guide the conversation during those "awkward silences".

Information from the Landowner Profile Form shall be entered into the Private Forest Landowner Database. This information will be helpful for the forester to serve as a landowner/property reference over time, for other foresters to see/use if they are working with the landowner on a specific request, and after staff changes so that the incoming forester can easily access basic information about the landowner and their property. This information can also be used to build marketing and outreach efforts.

Gather materials

A plat map, aerial photo, or a simple map developed by the forester can be helpful to orient the landowner with their property.

If planning to bring publications, try not to overwhelm the landowner with information they may not be ready for or interested in. Consider only bringing one or two publications that are relevant based on the initial phone call with the landowner. Consider bringing a forester bio to leave with the landowner.

A note about collecting forest reconnaissance

If the forester determines there is a need to collect detailed forest reconnaissance, it should typically occur after the initial walk-through. Remember, the forester's goal is to "meet the landowner where they are". Coming to the walk-through with field recon already completed, with a completed Forest Stewardship Plan, or trying to conduct recon during the walk-through may not recognize where a landowner is on the engagement continuum. It is possible timber harvesting may not even be discussed at some initial walk-throughs and that is okay.

Conduct the walk-through

During the walk-through, actively listen to the landowner's values, interests, and needs before jumping to your own conclusions about what is best for them and their woodland. **Active listening** will allow the forester to determine what the landowner is ready to discuss.

If the landowner appears to be ready to manage their property, provide sustainable land management information and options which reflect the landowner's values, interests and needs. Be consistently flexible and find win-wins. Share information about available resources such as:

- Financial incentive programs (WFLGP, EQIP, CSP, MFL, etc.)
- Cooperating Foresters
- Other natural resource professionals
- Landowner Partner Groups/Publications and Associated Resources

If the landowner is receptive, do something fun with them to pique their excitement such as coring a tree, explaining how to use a prism, or showing/telling them an interesting fact about a tree or plant on their property.

If it wasn't obtained during the initial phone call, be sure to ask the landowner for their contact information, especially if their mailing address is different than their property address. Also ask the landowner how they prefer to communicate moving forward, whether by home phone, cell phone, email, etc.

Active Listening

Consider the following information and think about using the phrases or questions below to show the landowner that you are listening and that you care about what they have to say.

Make the Landowner Feel Valued

- I appreciate your patience.
- I want to thank you for taking the time to speak with me today.

Put Yourself in Their Shoes

- If I were in your position, I would feel the same way.
- That would frustrate me, too.
- I would be asking the same questions you are.
- You are totally right.
- I would come to the same conclusion.

Suggest and Offer

- Personally, I would recommend you to...
- You can consider X.
- You might find X helpful.

Ask more Questions

- What would be the best-case scenario for you?
- How do you feel about X?

Paraphrase

- If I'm understanding you correctly...
- So, what you're saying is...
- Let me know if I'm getting the story right...

Casual Tone

- Thanks for waiting this out.
- I'd love to help you with that.

Send written follow-up

Provide all landowners with written follow-up within one month of the walk-through. How detailed the follow-up is will depend on the nature of the walk-through and what was discussed. Be sure the written follow-up uses plain language and avoids jargon and acronyms.

Follow-up could include one or more of the following:

- Letter with basic information (note: there is a compilation of letter content to use for your walk-through follow-up letter in the Forester Toolkit, known as the "[letter bank](#)")
- Forester bio
- Practice plan
- Forest Stewardship Plan
- Detailed property map
- Landowner Assistance available through Partner Organizations
- Publications, but only include those related to specific subject areas that were discussed during the walk-through (e.g. a pamphlet about a specific invasive species or a specific forest health issue, WWOA brochure). Use discretion when sending publications or other materials, as some landowners will be overwhelmed with too much information. Consider providing a brief explanation of the publication(s) that are being included with the written follow-up and how they relate to the discussions that occurred during the walk-through.
- Contact information for other natural resource professionals if needed
- Action item that the landowner can be successful with that is related to their values, interests and needs, such as reviewing a publication/website, or completing a small TSI project.

If the landowner did not appear to be receptive to sustainable forest management (e.g. they want to clear and build, etc.), brief written follow-up is still required. The letter could, for example, simply thank the landowner for their time, request the landowner contact the forester if they decide to harvest timber, and provide the forester's contact information.

Tracking

The walk-through, and any/all subsequent actions the landowner takes must be recorded in the Private Forest Landowner Database.

POST WALK-THROUGH: BEST PRACTICES FOR LANDOWNER FOLLOW-UP

Check-in call after receipt of walk-through follow-up letter

The Property Walk-through Policy includes sending a write-up to the landowner with recommendations for action and a visit summary within one month of the walk-through. It is recommended, that while the walk-through and letter are still fresh in the landowner's mind, to check-in with them one-month after they receive their follow-up letter. As the landowner typically won't have had a lot of time to take action, this purpose of the call is to answer questions, provide additional resources, reaffirm interest in assisting them and continuing to build a professional relationship. While a one-month check-in is recommended, the forester has the flexibility to determine when to place the check-in phone call based on the nature of the walk-through and the recommendations made in the walk-through follow-up letter.

Best practices for follow-up phone call

Levels of "action" refer to where a landowner may be in their decision-making process or commitment to perform work on their property. After they receive their follow-up letter from the forester, landowner expectations are low given the short period of time after the walk-through. However, in some cases, landowners may be making progress toward the recommendations given by the forester. Understanding which level of "action" the landowner is at during the follow-up call will help the forester ask the right questions, provide the right service and set the right follow-up schedule. Following-up with a phone call is the preferred first method of contact, but if the landowner either isn't responding or has made it clear they prefer to use email the forester can use that as a next step. The following 'Best Practices' can be utilized no matter the form of communication.

Landowner Did Not Read/Remember the Recommendations

The landowner did not or does not remember receiving the follow-up letter, or received it and has not had a chance to read through it yet.

If the landowner does not remember receiving the letter, consider asking the following questions:

- "That's a shame, can I confirm your address?"
- "Would you like to go over the letter over the phone?"
- "I will get it in the mail and check back in with you in one month."

If the landowner received the letter and has not had a chance to read through it yet, consider asking the following questions:

- "Would you like to read it today and I can call you back later?"
- "Is there something you would like to discuss that you remember from our walkthrough?"
- "Have you been out on the property since we last walked it?"

Don't get discouraged. The landowner may be dealing with competing priorities and hasn't had an opportunity to reflect on your walk-through. Be sure to confirm their contact information, you can discuss the walk-through over the phone and/or re-send the letter.

Recommended follow-up: 1 month. The landowner needs another chance to read and process your letter.

Landowner Read the Recommendations

The landowner received your letter and read through your recommendations. They haven't made any decisions or progress towards your recommendations, and may or may not have questions for you.

If the landowner doesn't have any questions, consider asking the following questions:

- "How do you feel about my recommendations?"
- "Anything excite/concern you about the recommendations?"
- "Is there anything additional that you would like to discuss not mentioned in the letter?"

If the landowner has questions or concerns, consider asking the following questions:

- “Are there any other questions or concerns I can address for you?”
- “How can we modify the recommendations to address your concerns/questions?”
- “What clarification(s) can I make or better explain?”

Ask questions to determine where the landowner is in making a decision, what they are most interested in and ask how you could help. It would be appropriate to send additional information on their topic of interest or information to address their questions.

Recommended follow-up: 3-6 months. The landowner still needs time to think and make a decision.

Landowner Made a Decision

The landowner shares a decision they’ve made regarding recommendations provided to them. They intend to act upon the recommendations, but they haven’t taken the first step yet. They may have decided to seek additional information, get a plan written, enter a program, do the work themselves or hire someone to complete the work.

If the landowner has decided to act upon a recommendation, consider asking the following questions:

- “How can I help you get started?”
- “Do you feel like you have all the information/resources you need to get started?”
- “What’s the first step you plan to take?”
- “Do you have any hesitations about getting started?”

Answer questions about their decision and help the landowner make a plan to get started. It would be appropriate to offer up a list of cooperators, information, workshops, events, or cost-share programs.

Recommended follow-up: 1-3 months. It will depend on the decision they have made and an agreed upon timeline for that decision to turn into action.

Landowner Has Taken Action

Taking action could be as small as reading a brochure or purchasing equipment, or larger like starting to clear invasives. They are motivated and have either made a commitment to act upon one of the recommendations like hiring a cooperator or signing up for cost-share, or in some cases, they may have started on or completed one of the recommendations.

If the landowner has started taking action or making progress towards a recommendation, consider asking the following questions:

- “How is it going?”
- “Do you feel like you have all the information/resources/equipment to keep going?”
- “When do you expect to be completed?”

If the landowner has completed a recommendation, consider asking the following questions:

- “How did it go?”
- “Would you like to show me what was done and see what we can work on next?”
- “Have you considered which recommendation you’d like to work on next?”

Whether the landowner hired the work out or plans to complete the work themselves, celebrate their success! Review the work scheduled to be completed and answer any questions they have about the work or working with a cooperator. Ask questions to learn about how the work is going, and help address any issues or answer any questions that have come up.

If nearing the end of the work, help identify the next step the landowner should take once the work is complete. If appropriate, a visit to see the on-going or completed work can go a long way in building that relationship and moving the landowner on to the next step.

Recommended follow-up: 1-6 months. It will depend on when the work might be completed, if the landowner is struggling to get someone hired, or the next step that was identified.

Set expectations with the landowner before ending the conversation

Each time you have contact with a landowner, whether on the phone, via e-mail or in person, consider where they are in their decision-making process. Before the end of the conversation or correspondence, consider setting expectations by clearly outlining the next steps including the date and method by which follow-up contact will be made (e.g., a phone call, letter, etc.). Always make sure that follow-up occurs as agreed upon.

REQUESTS FOR WALK-THROUGHS ON LANDS FOR SALE

DNR foresters shall not assist prospective buyers or realtors working for prospective buyers by conducting property walk-throughs on private, non-MFL lands. Although s. NR 1.212(1)(a), Wis. Adm. Code indicates it is a high priority to provide assistance to landowners who request a property walk-through, prospective buyers or realtors interested in the sale of a property are not the landowners and therefore do not qualify to receive this first-priority assistance of DNR foresters. Even if the landowner is the individual who requests a walk-through, but wants a potential buyer or realtor present, administrative code makes it clear that walk-throughs are supposed to be based on requests for management guidance, and should not include estimating the value of the land or the timber. Landowners who request walk-throughs with potential buyers or realtors should be provided a list of the Cooperating Foresters in their area who may be able to provide timber and/or land appraisals, since appraisals of private forest land by a DNR forester are explicitly prohibited in s. NR 1.212(3)(c)1., Wis. Adm. Code. DNR foresters may only provide general information on established stumpage values and current market trends. Refer to “Value of Timber, Advising Owner” in Chapter 30 of the Private Forestry Handbook for additional information.

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