

# So You Bought the Farm?

## Top Ten Recommendations for New Forest Landowners

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A good friend and long-time tree farmer recently joked that the emphasis professional foresters place on management plans was driving him to drink. He's been an active forest landowner for over 40 years and has well-written plans for all of his properties. But his point is well taken. Landowners learn about their woodlands through hands-on experience, not from plans. Successful forest management begins with walking and getting to know every acre of your woods.

As an extension forester working with private forest landowners, I field a lot of calls from new landowners asking about their management options. Inevitably, these calls lead to discussions of written plans and professional assistance. While I'm a strong advocate of planning and assistance, I've learned that these resources are most valuable when landowners have already taken time to become acquainted with their woods. Your awareness of forest conditions will enable you to "read your land," and better prepare you to interact with a professional forester to create a management plan. By following the recommendations below, you'll begin to formulate goals for your land that are grounded in the realities of on-the-ground conditions. By getting to know your woods now, you'll establish a base of knowledge that will help you monitor changes in your forest over time.

### **1. Get a topographic map and aerial photo for your property.**

Topographic (topo) maps and aerial photographs are the basic tools foresters and landowners rely on for management planning and forest resource assessment. These tools are readily available and invaluable in helping you identify important features on your land such as slope, aspect, streams and watersheds, access points, property boundaries (see #2 below), land uses, and roads. Used together, maps and photos can help you delineate forest stands, the basic management unit of forestry. Stands are distinct sections of your property with similar soils, aspect, tree species, and landscape features that are managed for specific objectives, separate from other stands on your property. In addition to helping you identify features of your own property, maps and photos help you picture your property in the surrounding landscape.

When laying out a timber sale, topo maps are used to locate haul roads, landings, property lines, and access points to state roads. The most useful topo maps for landowners are the US Geological Survey's 7.5 Minute Topographic Quadrangle Series, commonly referred to as a topo quads, where 1 inch on the map equals 2,000 feet on the ground. At this map scale, 1 square inch represents about 90 acres.

Available in black and white and infrared, aerial photos are used to identify land uses such as forest, agriculture, and development. Because most aerial photography is flown in the winter, evergreen and hardwood stands are readily identified. Topo maps and aerial photos are inexpensive, readily available, and can greatly reduce the amount of field work needed for planning management activities. However, both require field verification to identify changes in forest and road conditions. A good source for topo maps is local camping stores and outfitters. Your Farm Services Agency can help you purchase an aerial photo for your property.

## **2. Walk, identify, and mark your property boundaries.**

Proper identification of your boundary lines is critical to controlling trespass, preventing timber theft, identifying easements and rights-of-way, and planning management activities such as timber sales and prescribed burning. However, locating your boundaries may be more than just a walk in the woods. In the eastern US, property boundaries were laid out on the metes and bounds system, often relying on geologic and other natural features for boundary lines and markers. Old deeds commonly refer to large trees and piles of stones that may have long since disappeared from the landscape. Boundary markers to look for include pipes, rebar, rock piles, car axles, painted trees, and decaying fences. Old barbed wire is sometimes just below the leaf layer long after boundary fence posts have rotted away.

In the absence of obvious boundary markers, identifying property boundaries will require some detective work for your property deed at the county courthouse. This deed search is also important to ensure you own the rights to your timber and subsurface minerals and to identify other covenants, easements, and restrictions. A search for a legal description of your boundaries begins with the county tax map and land book (an alphabetical listing of landowners) and ends with a search through the deed books. Note that while tax maps show the relation of adjacent properties, they are not precise descriptions of property boundaries. Another strategy for piecing together hard to find boundaries is to locate the deed descriptions and plats (if they exist) for neighboring properties. Don't hesitate to ask for help!

If you're still having trouble locating your boundary lines you may need to hire a professional surveyor. But if you want your lines marked (and not just the corners) you must ask. Better yet, work alongside the surveyor and mark your boundary trees with a brightly colored exterior latex paint. An average rate for surveying in the South is \$0.25/foot. That's about \$2,000 to \$3,000 for 100 acres depending on the shape of the property. Since surveys are considered a management expense, try to plan your survey during the same year you sell timber and deduct the survey cost from your timber sale taxes.

## **3. Talk and work with your neighbors.**

You and your adjacent forest landowners share more than just property boundaries.

You also share similar forest types, climates, topography, and are influenced by the same local market conditions for your forest products. Some of your neighbors have likely had both good and bad experiences selling timber and can recommend consultant foresters, logging contractors, mobile sawmillers, and markets for your forest products. Veteran landowners may be aware of forestry education programs (see #7 below), landowner associations and marketing cooperatives, and local and state regulations affecting forest management activities.

Working with your neighbors can also help reduce your land management expenses by sharing the costs of equipment rentals, fence and boundary line maintenance, tree planting, herbicide and fertilizer treatments, prescribed burning, and other contract services. In addition, your neighbors can keep an eye out for trespassers and poachers when you're out of town - a real service in ginseng territory! Introduce yourself to your neighbors.

#### **4. Talk and work with your family and heirs.**

You may have your own ideas about what you want from your property, but it's a good idea to talk with your family and heirs about their goals as well. Regular family meetings will help identify special places that should be protected like favorite hunting spots and are also important for assessing the unique resources of family members. These resources include existing knowledge and a desire to learn about forest management, and available equipment, time, labor, and capital.

The family meeting is also an important step in basic estate planning and forming a strategy for the transfer of your property from one generation to the next. Some heirs may simply not have an interest in inheriting property, while others are more than willing to spend their weekends improving the family forest. Many life lessons are learned working in the woods and annual or seasonal family work days are a great and relatively inexpensive way to maintain roads, create hiking trails, cut firewood, repair equipment and structures, plant trees, and establish wildlife food plots.

#### **5. Take advantage of forestry education programs.**

Having attended and conducted dozens of landowner education programs, I've seen much more than just basic information transfer between professional foresters and landowners. Experienced landowners know the many values of workshops, field days, and tours. The science, practice and regulation of forestry changes constantly - there's always something new to learn that will help you better manage your woodlot. Gatherings of landowners are a one-stop and shop for new and veteran landowners to:

- network with other local landowners;
- learn about local market trends and opportunities;

- become aware of new income and management options - timber, non-timber forest products, hunting leases, conservation easements, green certification, etc.;
- meet local natural resource professionals that you're likely to work with in the future.

In many states, forestry education programs are sponsored and taught by state forestry agencies, cooperative extension, private consultants, and industry foresters. This multi-agency approach allows landowners to understand and take advantage of the broad array of services available from different agencies in their area. Your local extension office and county forester are good sources for information on upcoming education programs.

## **6. Learn your trees.**

Each tree species is uniquely suited to specific site factors including aspect, soil composition and fertility, and moisture requirements. For example, northern red oak and yellow poplar are best suited to deep, rich soils with ample moisture. You can expect to find these trees growing in coves and on northeast facing slopes. Hardier Virginia pine and eastern red-cedar have lower moisture requirements and can tolerate the dryer, poorer soils associated with sunny southwest facing slopes. Some species, like red maple, will grow just about anywhere. Observant landowners can become experts in learning species-site relationships, and with practice reading the land can become intuitive. This is a valuable skill in assessing the potential of a site to grow high quality hardwoods and in determining to purchase or pass on woodland for sale.

The first step in reading your land is knowing how to identify trees, or dendrology. While leaves are the most conspicuous way to identify trees, it's easy to become "leaf-dependent." Leaves are only on the tree for half of the year and a lot of forest management activities occur when the leaves are on the ground. Each tree species differs with regard to bark, twigs, buds, and form; these characteristics are a sure way to identify your trees throughout the year. The best dendrology books are not necessarily the most colorful and expensive. A good and inexpensive dendrology book is *Woody Plants in Winter* (Boxwood Press, 1992) by Core and Ammons. Resources such as the Virginia Tech Dendrology Website (<http://www.cnr.vt.edu/dendro>) are available on the internet at no cost.

## **7. Investigate your land-use tax assessment.**

Annual property taxes are a major concern of private forest landowners and rightly so. As urban areas continue to sprawl and land prices increase, property taxes climb. Increasing taxes on "open-space" land use, i.e., agriculture and forestry, are a major disincentive to sustainable forest management and a leading cause of forest fragmentation. Where available, forest landowners who wish to actively manage their forests rather than selling to developers can greatly reduce their property taxes by

enrolling in their county's land-use taxation program or an agricultural-forestal (ag-forestal) district.

Both programs are designed to conserve and protect agricultural and forest land use and acknowledge the role forests and farmland play in providing clean water, air, wildlife habitat, and aesthetics. Land-use taxation and ag-forestal districts reduce property taxes by assessing farm and forest acreage values at their current use rather than their highest potential or fair market value, i.e., subdivision for development.

Requirements for forest land-use designation differ by state and county, but commonly include a minimum of 20 wooded acres and proof of active management via a state-approved written forest management plan. Ag-forestal districts differ from land use taxation programs in that they are landowner initiated programs covering specific localities rather than entire counties. Ag-forestal districts are designed to provide property tax relief to forest landowners in counties that lack government initiated land-use tax programs. Some counties offer both land-use taxation and ag-forestal districts while other counties offer neither.

Most localities require that landowners apply for land-use taxation every year, while ag-forestal districts are reviewed every 4 to 10 years. If you are a new landowner, check with your local commissioner of revenue for details on ag-forestal districts and land-use tax requirements in your area.

## **8. Keep good records and establish your basis.**

Too often, landowners only start keeping records on their management activities and expenses as they get ready to sell timber. Record keeping is perhaps the easiest but most neglected task of woodland owners. At a minimum you should keep a journal of all expenses and income along with evidence of all transactions such as invoices, receipts, canceled checks, contracts, meeting agendas, mileage records, workshops attended, and maps that pertain to your land and forestry practices. These records will all become important at tax time, especially in years you sell timber.

An additional tax consideration and one that is best conducted when you purchase property is determining your basis. The basis of your forest land is the original amount you invested to purchase your property. This amount is the cost of land including roads and buildings, timber, fees for surveyors, realtors, foresters, attorneys, and other costs associated with the acquisition. Basis is used to determine your gain or loss on timber sales and land exchanges, and for calculating amortization, cost recovery, depletion, and casualty loss deductions. While timber cruises are often conducted in preparation for a timber sale, it's a good idea to have a forester determine the value of your timber when you purchase or inherit forest land to establish your basis in timber.

## **9. Join your state forestry or forest landowner association.**

Private forestry associations are another excellent source for current information on the practice, science, and regulation of forestry. Many associations publish magazines and most hold annual conferences that include tours, information sessions, and workshops. These meetings act as annual reunions for landowners across the state and also provide networking opportunities between landowners and professional foresters.

Probably the most valuable service provided by private forestry associations are their legislative updates including timely notification on pending local, state and national regulations and their advocacy of private forest landowner interests at the local and state levels. Two national landowner associations, the National Woodland Owners Association (NWOA) and the Forest Landowners Association (FLA) act as advocates for private forest landowners at the federal level. These organizations also publish woodland management magazines.

## **10. Contact a professional forester.**

No doubt that by going through the above steps you will become familiar with your woods and begin to develop goals for your property. Your goals may include improving wildlife and game habitat, generating income from timber and non-timber forest products, and establishing recreation sites and trails. While not incompatible, achieving these goals will require a clear set of actions and written plan. This is the role of the professional forester. In addition to helping you develop a management strategy, foresters can help you schedule and conduct your management activities including timber sales, forest regeneration, and stand improvement, and ensure that your forest operations comply with best management practices.

Three major types of foresters: industry landowner assistance, state agency, and private consultants are available to provide their services and experience. Their services differ, but many landowners take advantage of all three types. My recommendation is usually to first contact your state forestry agency for a free site visit and to talk over your goals.

There's no substitute for getting out on your property. Knowledgeable landowners have more focused and productive interactions with their foresters. Don't let management planning just happen – become the principal partner in the management of your woodlands. As a private forest landowner, you are the most important factor in ensuring that your goals are reached and your forest resources are sustained.

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