

Standards and Review Criteria for Managed Forest Plans Prepared Under the Managed Forest Tax Incentive Program

A. Introduction

These Standards and Review Criteria have been prepared in support of both the Managed Forest portion of Regulation 282/98 of the *Assessment Act* and *Ontario Managed Forest Tax Incentive Program (MFTIP) Guide – Updated January 2012*, hereafter referred to as *The MFTIP Guide*. This version of the Standards and Review Criteria incorporates and replaces the Standards for the Approval of Managed Forest Plans under the Managed Forest Tax Incentive Program dated January 2006.

A.1 Background

Managed Forest Plans must be prepared for properties that are entering the MFTIP. *The MFTIP Guide* includes instructions for the preparation of the plans and program application forms. The framework for preparing a Managed Forest Plans for entrance into the MFTIP is found in *A Guide to Stewardship Planning for Natural Areas* hereafter referred to as *The Planning Guide*. All plans must be approved by a Managed Forest Plan Approver (MFPA). Managed Forest Plan Approvers have been designated by the Ministry of Natural Resources (MNR) and are independent contractors, not employees of the MNR. The MNR is responsible for monitoring the approval of Managed Forest Plans to ensure that the approvals meet the requirements specified in *The MFTIP Guide* and in the Standards and Review Criteria.

A.2 Purpose of the Standards and Review Criteria

The purpose of the Standards and Review Criteria is to:

- document requirements of Managed Forest Plans for entry into the MFTIP;
- present a quantitative assessment system by which Managed Forest Plan approvals will be reviewed by the MNR;
- act as a procedural guide to assist MFPA's in carrying out approvals;
- act as a study guide for individuals interested in becoming a MFPA; and.
- assist landowners who are interested in preparing their own plans under the guidance of a MFPA.

A.3 Layout of the Standards and Review Criteria

The Standards and Review Criteria have been prepared to be used in conjunction with *The MFTIP Guide* and *The Planning Guide*. Sections of both of these guides are referenced in this document where further information is provided. The requirements of approvals of Managed Forest Plans under the MFTIP are found in the Standards and Review Criteria. The Review Criteria is a quantitative approach by which MNR will score plan approvals to ensure that standards are met.

The General Information and Procedural Guidelines are a supplement to the Standards and Review Criteria. As new information is developed and procedures are modified, updated versions will be forwarded to active MFPA's with instructions to replace outdated versions.

B. Reviewing Managed Forest Plans

The framework for preparing a Managed Forest Plan for entrance into the MFTIP is found in *The Planning Guide*. MFTIP guides printed in 1997, 1998, 2000 and 2006 included forms for the preparation of plans. Many landowners have plans based on these forms and these plans may continue to be used. Over the years many landowners and MFPA's have designed electronic templates for plan development based on the direction provided in the MFTIP Guides. Regardless of the plan format – plans entering the MFTIP will undergo various stages of review to ensure that plans meet the program standards.

Review Stages:

- the approval process conducted by the MFPA;
- the administrative review conducted by MNR MFTIP program staff; and
- a technical review may also be conducted by MNR MFTIP program staff

Each of the review stages are discussed below.

B.1 The Approval Process

Landowners wanting to enter their property into the MFTIP must hire a MFPA to approve their Managed Forest Plan. In order to approve the plan the MFPA must:

- visit the property;
- verify the forest is eligible;
- review all sections of the Managed Forest Plan to ensure it meets program standards;
- ensure that proposed management activities are in accordance with good "forestry practices" as defined in the *Forestry Act*; and
- complete an Approval Form and associated Area Verification Form(s).

Good forestry practices as defined in the *Forestry Act* means: "*the proper implementation of harvest, renewal and maintenance activities known to be appropriate for the forest and environmental conditions under which they are being applied and that minimize detriments to forest values including significant ecosystems, important fish and wildlife habitat, soil and water quality and quantity, forest productivity and health and the aesthetics and recreational opportunities of the landscape.*"

The MFPA may also be involved in the preparation of the entire plan or in assisting in areas such as preparing maps and inventories or by making specific recommendations regarding appropriate management activities. Further information on the approval process is found in the General Information and Procedural Guidelines.

B.2 The Administrative Review

Approved Managed Forest Plans are submitted to the MNR MFTIP office for processing. MFTIP program staff will conduct an administrative review on each Managed Forest Plan and the properties being entered into the MFTIP. The following items are reviewed and confirmed:

- the plan has been approved by an active MFPA and all application form(s) have been included and are completed properly;
- the plan is included, meets minimum requirements and has sufficient content and detail to facilitate resource management activities;
- the Approval Form(s) and Area Verification Form(s) are properly completed and all supporting documentation is included;
- maps are provided that show where the property is located and the area to be classified and assessed as Managed Forest (Section 4: Property map and surrounding area from *The Planning Guide*).

Approval Forms, maps or components of the plan may be shared with the Municipal Property Assessment Corporation (MPAC) to facilitate an accurate assessment of the properties. Further information on administrative reviews can be found in the General Information and Procedural Guidelines.

B.3 The Technical Review

MNR MFTIP program staff may conduct a more detailed review of Managed Forest Plans to ensure program standards have been met. The reviews are conducted using the Managed Forest Plan Review Form. A copy of this form is found the back of the Standards and Review Criteria. Using the form, the approvals are scored section by section within defined parameters. Detailed descriptions of the scoring are incorporated in this document under the Review Criteria for Managed Forest Plans section. In the scoring, there are two categories of concern: i) minor deficiencies, and ii) major deficiencies.

Minor deficiencies impact the quality of the plan but do not bring the overall integrity of the plan into question. Minor deficiencies are dealt with by deducting points from the section where the weakness was noted. Excessive deduction of points may indicate that a poor approval was carried out by the MFPA.

Major deficiencies bring the overall integrity of the plan into question and occur when a Mandatory Item has not been addressed.

Mandatory Items are critical in the evaluation of management plans and provide benchmarks to ensure program standards are being met in vital sections of the plan. Mandatory Items assist in concluding that;

- the property is eligible for the MFTIP (area, ownership, stems per acre, good forestry practices planned etc.).
- the plan includes maps that allow for the property to be located.
- the plan includes maps that allow for the area to be reclassified as Managed Forest to be located.
- only appropriate management activities are scheduled.

Mandatory Items are scored with either a “0 or 1” or “0 or 5 or 10”.

For Mandatory Items scored as “0 or 1”:

“0” indicates that the Mandatory item was not complete or accurate.

“1” indicates that the item was complete and accurate.

For Mandatory Items scored as “0 or 5 or 10”:

“0” indicates that the Mandatory Item did not meet standards.

“5” indicates that the Mandatory Item was completed.

“10” indicates that the Mandatory Item was completed and that other information that was requested was provided.

If a “0” is recorded for one or more Mandatory Items, the plan is deemed to have major deficiencies.

Scoring of approvals: the overall quality of the approval is determined based on scores for each of the sections and subsections of the plan and the number of Mandatory Items which scored “0”. *Plans falling below a certain overall score (e.g. 75%), or plans with one or more Mandatory Items that scored “0” constitute a failing grade and will be returned to the MFPA for correction and/or upgrading. The MFTIP Administrator may adjust the minimum acceptable score as required to meet program objectives and standards.*

C. Review Criteria for Managed Forest Plans

The Review Criteria for Managed Forest Plans is based on the planning framework and forms found in *The Planning Guide*. Some landowners and MFPA’s prepare plans using older versions of forms or in a tabular format. When preparing any plan it is imperative that the section headings of the planning framework found in *The Planning Guide* are referenced as these section headings form the basis for the review. The following information provides details on the scoring of minor and major deficiencies for plans prepared under the MFTIP as well as providing suggestions for comments to be made during MNR review of plans.

Plan preparation details

Review Criteria: The dates for the 20-year plan period and the period of 10-year management activities are correct.

Discussion: Plans are prepared for a 20-year period with management activities scheduled for the first 10-years of the 20-year period. The plan begins on January 1 of the year of reassessment. Include reference to any mid-term updates that may be necessary for planning or reporting purposes (e.g. 5-year progress report).

Scoring: 0 to 1

- 0.5 marks for the correct 20-year plan period.
- 0.5 marks for the correct period of 10-year management activities.

Section 1: Property owner information

1.1 Registered property owner

Review Criteria: The Registered Property Owner(s) is/are listed with the required information.

Discussion: Please refer to the General Information and Procedural Guidelines for further information.

Scoring: 0 to 1

- 0.5 marks if the correct name and address information is provided.
- 0.5 marks if a phone number is provided.

1.2 Plan author information

Review Criteria: The name of the person(s) who prepared the plan is/are listed with the required information.

Scoring: 0 or 1

- 1 mark if the name and address information is completed.

Suggested Comments for Section 1:

- Note 20-year plan period, with management activities for a 10-year period. Reference any mid-term updates that may be necessary for planning or reporting purposes (e.g. 5-year progress report).
- Note reasons for lost marks in section 1.1 and 1.2.

Section 2: Property location information

2.1 Property location

Review Criteria: The required information is recorded.

Discussion: This section provides a record of properties being entered into the MFTIP. Property descriptions and area can be obtained from the Notice of Property Assessment.

Scoring: 0 to 2

- start with 2 marks and deduct for missing items.
- deduct .5 marks for each missing Assessment Roll Number.
- deduct .5 marks for each incomplete property description (Note: a complete description has municipality, lot, and concession information).
- deduct .5 marks for each missing area

2.2 Federal, provincial and local policies and regulations

Review Criteria: Relevant legislation is listed.

Discussion: Please refer to The Planning Guide for further information.

Scoring: 0 to 3

- 1 mark if relevant legislation is listed.
- 2 marks if relevant legislation is described/summarized, and information is provided to assist the landowner to find materials and documents (websites, literature, and provide reference to Section 10).

Suggested Comments for Section 2:

- Note where the marks were deducted and any missing relevant legislation.
- Relevant legislation may include but not limited to Assessment Act, Forestry Act, Professional Foresters Act, Endangered Species Act, local by-laws etc.

Section 3: Property history

3.1 Past activities.

Review Criteria: A general description of past activities on the property is presented.

Discussion: The longer that the current owner has owned the property, the more familiar they will be with its history. The purpose of this section is to demonstrate the link, or continuity, that is required between past activities in the forest, and those planned for the future. If there have been any previous Woodlands Improvement Act agreements, or other MNR or Conservation Authority advisory services on the forest, they should be noted. Also, any connection to plans prepared by previous landowners should be noted.

Scoring: 0 to 2

- 1 mark for providing a brief history.
- 1 mark for demonstrating the link, or continuity, that is required between past activities in the forest and those planned for the future.

3.2 The surrounding landscape.

Review Criteria: The importance of the property to the surrounding landscape is discussed.

Discussion: The plan should demonstrate a basic understanding of the role the property plays in the surrounding landscape for features such as providing habitat. The property may only provide a portion of the habitat requirements of a certain species and the activities that a landowner carries out on their own property may impact habitat features on a broader landscape level. Other issues such as corridors and connectivity of fragmented landscapes could also be discussed.

Depending on the involvement of professionals in the plan, this section may be more or less detailed. If the property is designated by the local municipality as a Significant Woodland or a Significant Wildlife Habitat, it should be stated. If the property contributes to other conservation programs such as Areas of Natural and Scientific Interest (ANSI's) or Environmentally Significant Areas (ESA's) or provincially significant wetlands, it should be stated.

Scoring: 0 to 2

- 1 mark for linking the property into the landscape.
- 1 mark for demonstrating a basic understanding of the roll that the property plays in providing habitat or benefit at the landscape level.

Suggested Comments for Section 3:

- Provide information on the level of detail that is required to attain full marks.
- Commend good efforts especially when the landowner has completed this section.

Section 4: Property map and the surrounding area

Review Criteria: The map is of sufficient quality to allow the property to be located and for MFTIP eligible portions and the ineligible portions to be located.

Discussion: This map allows for the property to be located and for MPAC to reassess the property. Aerial photographs are not suitable in most situations because of the difficulty in reproducing them. When maps are presented on sheets of paper larger than 11x17, or are in colour, two copies must be provided. The legend used in *The Planning Guide* should be followed (or enhanced) in order to provide consistency between different Managed Forest Plans.

The scale of the maps can vary to suit the size of the property. For example, a property less than 20 hectares (50 acres) may use a scale of 1:2,000 while a property of 400 hectares (1,000 acres) may need a scale of 1:5,000. Larger forests may need a scale of 1:50,000. A hand drawn map may be suitable if sufficient detail is provided.

Note: If the maps in Section 4 and Section 6 have been combined, score each map separately, according to the maximum points for each Section. If there are multiple maps for Section 4, score the maps separately and then average the scores.

Locating the property: The map should show the lot and concession lines for the township. A hand drawn map may be suitable if sufficient detail is provided. Where multiple properties are being submitted under a single Managed Forest Plan, the relative location of each of these properties (with roll numbers clearly labeled) must be shown.

Reassessing the property: Both eligible and ineligible areas must be shown. Parts of the property in other tax incentive programs (i.e., Farmland Tax Program or Conservation Land Tax Incentive Program) must be shown. Too much information on this map (i.e., excessive forestry information from FRI maps) may confuse this map and make it difficult to use for reassessment.

Mandatory Item:

- the map has sufficient information to allow an individual with nominal familiarity of the area to locate the property(ies)
- each property that is being applied for and its associated Assessment Roll Number is shown.
- residences or structures are shown.
- forest areas eligible for the MFTIP are shown.
- areas which are part of other property tax incentive programs are shown.
- ineligible areas are shown
- property boundaries are shown.
- an appropriate scale, based on the size of the property, is used.
- proper reference for each property (i.e. landowners name, roll number, etc.).

Standard mapping practices:

- north arrow.
- legend that describes the symbols being used.
- an appropriate scale, based on the size of the property.

- the map is legible.

Scoring: 0 or 5 or 10 (Mandatory Item)

- 0 marks if “No” is answered to the Mandatory Item.
- 5 marks if “Yes” is answered to the Mandatory Item.
- 10 marks if “Yes” is answered to the Mandatory Item, standard mapping practices are used and the map is legible.

Suggested Comments for Section 4:

- Note where the marks were lost and provide information on how to improve maps to attain full marks.
- Outline specific requirements that were missing if a Mandatory Item scored “0” and how to make corrections.
- Commend good efforts on behalf of the landowner/MFPA.

Section 5: Landowner objectives

5.1 Your general objectives

Review Criteria: The priority of objectives are ranked.

Discussion: Table 5.1 indicates why landowners are participating in the MFTIP. Information from this section is entered into the administrative database and is used to track trends in participation over time.

The Planning Guide asks the landowner the question: How important is the objective to you? - based on the scale “Less important to More important”. This means that the landowner may have more than one objective that is important or more than one objective that is not important.

Approvers are asked to interpret which objectives are most important to the landowner and to rank the objectives on the Managed Forest Plan Approval Form with the directions that:

- “1” means it is the landowner’s most important objective;
- do not duplicate priorities (i.e., rank numerically 1, 2, 3, 4, 5, 6); and
- rank only objectives that have a degree of importance to the landowner.

Scoring: 0 or 2

- 0 marks if “Your general objectives” is not completed.
- 2 marks if “Your general objectives” is completed.

5.2 Details about your property level objectives

Review Criteria: The plan explains why each objective listed in Table 5.1 is important to the landowner.

Discussion: Objective indicated in Table 5.1 should be discussed. Refer to *The Planning Guide* for examples.

Scoring: 0 or 2 or 4

- 0 marks if this section was not completed.
- 2 marks if there is an explanation of why each of the objectives as stated in Section 5.1 are important to the landowner.
- 4 marks if there is a thorough description of why the objectives as stated in Section 5.1 are important to the landowner and critical thought is given to how these priorities will guide management decisions.

5.3 How will you achieve your objectives?

Review Criteria: The strategies listed are realistic and compatible with the objectives.

Discussion: This section provides a “reality check”. Details should be provided on how the plan will be implemented. If the management objectives are too lofty, or if the work activities are too ambitious, the plan may be difficult to implement.

Scoring: 0 or 2 or 4

- 0 marks if this section was not completed.
- 2 marks if there is a description of how the plan will be implemented.
- 4 marks if there is detailed information on labour or equipment requirements; and programs or workshops that will be utilized to allow for the implementation of the plan.

Suggested comments:

- Note where marks were lost and comment on the strategies that the landowner is proposing.
- Make suggestions of programs or workshops happening locally that the approver or landowner might find useful.
- Commend good efforts on behalf of the landowner/approver.

Section 6: Detailed property map

Review Criteria: The forested land can be divided into compartments based on species composition, stand condition, age, height, stocking levels, site class, ecological land classifications etc.

Discussion: Compartments should be sufficiently uniform in species composition, arrangement, condition and age class to be distinguishable from the adjacent compartments. The minimum size of a compartment may be 1 ha (2.47 acres) or smaller depending on property size and the level of detail needed to accurately stratify the property. The maximum size will depend on the objectives. The minimum size and scale of the map should be similar to the property maps described in Section 4.

However, larger scales may be used to present more detailed information. Aerial photographs may provide a suitable base map in some situations. Forest Resource Inventory maps are suitable base maps.

Minimizing the number of compartments in order to minimize the amount of inventory work that should be completed is not a basis for stratification. Proper stratification is important to ensure that appropriate management activities are carried out. Compartment boundaries and identifiers / names and/or descriptions should accurately reflect the attributes of the compartment and be easy for the landowner to interpret and identify for management activities (e.g. Compartment 1- Mh7 Be2 Aw1, Compartment 2- Pw5 He2 Bf2 Ms1, Compartment 3 – Pr10 etc).

Scoring: 0 or 2 or 4

- 0 marks if no attempt was made to stratify the forest such that it is broken into distinguishable units.
- 2 marks if an attempt was made to stratify the forest.
- 4 marks if the forest was stratified appropriately for the objectives.

Review Criteria: The map uses standard mapping procedures.

Discussion: The legend used in *The Planning Guide* should be followed (or enhanced) in order to provide some consistency between different Managed Forest Plans. If there are multiple properties the roll numbers should be noted. The minimum size and scale of the map should be similar to the map in Section 4. Larger scales may be used to present more detailed information. Aerial photographs may be suitable in some situations. Forest Resource Inventory maps are suitable.

Scoring: 0 to 2

- start with 2 marks and deduct for missing items.
- deduct .5 marks if proper referencing is not used (i.e., roll number or landowner name, etc.).
- deduct .5 marks if there is no north arrow.
- deduct .5 marks if there is no legend that describes the symbols being used.
- deduct .5 marks if the map is not to an appropriate scale, based on the size of the property.
- deduct .5 marks if the property boundaries are not shown.
- deduct .5 marks if the compartment boundaries are not shown.
- deduct .5 marks if an appropriate identifier or description for each compartment is not used (i.e. C1, F1, W1, Maple-1, Mh7Or2Pw1, Open Bedrock, etc.)
- deduct .5 marks if physical features such as creeks, lakes, railways, rock outcrops, etc. are not shown.
- deduct .5 marks if access roads and trails are not shown.
- deduct .5 marks if residences or structures are not shown.
- deduct .5 marks if areas which are part of other property tax incentive programs are not shown.

<p>Note: If the maps in Section 4 and Section 6 have been combined, score each map separately, according to the maximum points for each Section. If there are multiple maps for Section 4 or 6, score the maps separately and then average the scores.</p>
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Section 7: Managed Forest Compartment Descriptions (Getting to know...)

Review criteria: The compartment is eligible for participation in the MFTIP:

Discussion: Depending on factors such as size, diversity, and management objectives, a property may have one compartment or many compartments. All compartments being entered into the MFTIP must have an inventory.

Each compartment being entered into the MFTIP should be individually assessed based on the requirements of Section 7. The average scores should then be entered into the scoring areas in the Managed Forest Plan Review Form. The assigned score may also be based on the review of any one, or a sample of compartment descriptions and at the discretion of the reviewers. If a Mandatory Item is not met in any of the compartments, a zero is recorded in the appropriate box and the compartment with the deficiency is noted in the comment section. If the plan includes compartments that are not eligible (i.e. residence, lawns, open fields, etc.) they are not scored.

Treed compartments eligible for the MFTIP must have at least:

- 1,000 trees of any size per hectare (400 stems per acre); or
- 750 trees per hectare (300 trees per acre) measuring more than five cm DBH (Note: this equates to a minimum basal area of 1.47 m²/ha); or
- 500 trees per hectare (200 trees per acre) measuring more than 12 cm DBH (Note this equates to a minimum basal area of 5.65 m²/ha); or
- 250 trees per hectare (100 trees per acre) measuring more than 20 cm DBH (Note: this equates to a minimum basal area of 7.85m²/ha).

Open areas greater than one hectare must be mapped. Open area compartments must have suitable inventories. On an eligible property, some area with less than the minimum number of trees may be entered into the program:

- natural open areas, such as forest openings or regenerating farm fields. No more than ten percent of the total eligible forested area, by roll number, may be entered into the MFTIP under this category
- natural areas that could not support trees through normal forest management activities. This includes swamps or beaver floods, land without enough soil to grow trees and open water. No more than twenty-five percent of the total eligible forested area, by roll number, may be entered into the MFTIP under this category.

On the green Area Verification Form, there are separate sections to track area associated with the two types of open area. The two types of open area must be treated separately and mapped as distinct compartments

Mandatory Item: The compartment is eligible for the MFTIP and the two types of open area compartments (if present) are mapped as discrete units.

Scoring: 0 or 5 or 10 (Mandatory Item)

- 0 marks if “No” is answered to the Mandatory Item.
- 5 marks if “Yes” is answered to the Mandatory Item.
- 10 marks if “Yes” is answered to the Mandatory Item and the inventory clearly demonstrates eligibility (relative term based on reviewers expertise)

7.1 Compartment number/name

Review Criteria: The compartment number/name and associated area are presented.

Scoring: 0 to 2

- 1 mark if the compartment number and name have been assigned and one or the other is shown on the map in Section 6 (Detailed property map)
- 1 mark if the acres shown for each compartment agrees with what is recorded on the Area Verification Form.

7.2 Compartment characteristics

Review Criteria: The Compartment characteristics section is completed.

Discussion: In situations where particular site characteristics are not relevant - full marks should be awarded.

Scoring: 0 to 2

- 1 mark for presenting appropriate soils information (soil type, soil depth and stoniness are completed, drainage, topography).
- 1 mark for presenting access information.

Section 7.3 Compartment history

Review Criteria: The Compartment history is completed and is more specific than the property history.

Scoring: 0 to 2

- 1 mark for an attempt at providing a history.
- 1 mark for providing sufficient information to allow the reviewer to understand if the objectives and future goals reflect what has already been completed (e.g. for a plantation: when the planting was done, species and spacing, if there has been a previous harvest cut, how much was sold, etc).

7.4 Inventory

Review criteria: A compartment inventory is presented for each compartment being entered into the MFTIP and the inventory should reflect the management objectives and planned activities.

Discussion: The minimum acceptable inventory is a completed Section 7.4 from *The Planning Guide* using either the upland or a wetland form. The inventory should reflect the management objectives and planned activities. For example, compartments being managed for environmental protection should identify the environment that is being protected. If a harvest or other intensive forest management activity is planned it is recommended, but not mandatory, that a detailed forest inventory be planned or completed before the activity takes place (as per Table 1 of *The MFTIP Guide*).

There are a number of different formats that a compartment inventory can be presented including: forms from previous versions of MFTIP guides; inventory forms

found in Section 7 of *The Planning Guide* or the inventory form at the back of *The Planning Guide* (i.e., Enhanced forest inventory and harvest plan). In addition, some MFPA's have developed their own tabular format to present inventory data. These are all acceptable - as long as program standards are met.

Mandatory Item: An inventory is prepared for each compartment being entered into the MFTIP and the inventory supports planned activities (Note – the minimum acceptable inventory is a completed Section 7.4 from *The Planning Guide* using either the upland or a wetland form)

Scoring: 0 or 5 or 10 (Mandatory Item)

- 0 marks if “No” is answered to the Mandatory Item.
- 5 marks if “Yes” is answered to the Mandatory Item.
- 10 marks if “Yes” is answered to the Mandatory Item and the inventory is “comprehensive” (relative term based on reviewers expertise)

7.5 Wildlife

Review Criteria: If the landowner’s objectives include wildlife habitat and/or environmental protection Section 7.5 should be completed.

Scoring: 0 or 2

- 0 marks if it should have been completed but was not.
 - 2 marks if it should have been completed and was.
- or
- 2 marks if the objectives did not necessarily require Section 7.5 to be completed

7.6 Long term objectives and Short term activities

Review Criteria: The Long term objectives and Short term activities section is completed.

Discussion: This section provides details on what activities will take place to achieve the objectives stated in Section 5. In the MFTIP, appropriate activities are encouraged whereas inappropriate activities are not consistent with the intent of the program. Engaging in appropriate activities assists landowners in achieving their goals and are consistent with good forestry practices. Inappropriate activities detract from the health of the forest. For further information on appropriate management activities refer to Table 2 in *The MFTIP Guide*.

Scoring: 0 or 5 or 10 (Mandatory Item)

- 0 marks if management activities are inappropriate or if no activities are scheduled for the 10 or 20 year period
- 5 marks if appropriate management activities are planned but insufficient information is provided to help ensure that “good forestry practices” will be carried out (i.e., are there references to cutting practices, Registered Professional Foresters, tree marking, etc.)
- 10 marks if appropriate management activities are planned with reference to “good forestry practices”.

Section 8: Planned Ten Year activity summary

Review Criteria: The proposed ten-year activities – are summarized by compartment.

Discussion: This table is a summary of the specific long term objectives and the short term activities for each of the compartments listed in Section 7.6. It should detail the management activities that will be conducted during the 10-year term to in order to meet the management objectives of the landowner. It should be consistent with the details presented in Section 7.6 for each of the compartments. The table will form the basis for the landowner to assess their progress in the MFTIP and must be submitted as part of the Five-Year Progress Report. Program participants must submit the Five-Year Progress Report by July 31 of their fifth year in the program.

Planned activities should also include items surrounding the maintenance of the Managed Forest Plan to keep the plan up to date and current (implement the plan with assistance of forest professionals, record activities as performed, etc) and compliant with MFTIP (i.e. submit 5-Year Progress Report, renew plan, submit plan amendments)

Mandatory requirements:

- the planning period is listed
- plan maintenance-administration activities and deadlines for the 5-Year Landowner Report and Renewal are listed
- the compartment name and/or identifier is listed.
- the management activities needed to achieve the objectives are listed (summarized from Section 7.6).
- there is/are quantifiable measures which allows the landowner to assess their progress (i.e. metres of trail constructed, number of trees planted, acres of thinning, etc.)
- the year(s) when the work is scheduled is recorded.

Scoring: 0 or 5 or 10 (Mandatory Item)

- 0 marks if Mandatory Requirements are missing or if quantifiable measures and years scheduled are not included.
- 5 marks if all information is present but quantifiable measures and year(s) scheduled tend to be vague and/or confusing.
- 10 marks if the information is complete and the quantifiable measures and schedules would allow the landowner to assess their progress.

Suggested Comments for Section 8:

- Note where Mandatory Items are missing and provide suggestions or clarifications required to improve Section 8.

Section 9: Report of activities

Review Criteria: The Report of activities section is attached.

Discussion: Section 9 and Section 10 are included in the plan so that the landowner can keep track of what management activities have been done and what learning opportunities have been pursued as a result of the Managed Forest Plan. This information provides the framework for the development of the Five-Year Progress Report

Scoring: 0 to 2

- 0 marks if it is not attached.
- 1 mark if it is attached.
- 2 marks if it is attached and the planning period is listed.

Suggested comments for Section 9:

- Reiterate the importance of this section and suggest that the approver checks with the landowner occasionally to ensure that this section is being updated on a regular basis.

Section 10: Contacts and References

Review Criteria: The Contacts and References section is attached.

Discussion: Refer to discussion in Section 9.

Scoring: 0 to 2

- 0 marks if it is not attached.
- 1 mark if it is attached.
- 2 marks if it is attached and includes contacts and reference materials used to develop the Managed Forest Plan and/or information to help the landowner to implement the plan.

Suggested comments for Section 10:

- Reiterate the importance of this section and suggest that the approver checks with the landowner occasionally to ensure that this section is being updated on a regular basis.

Overall Plan Quality

Review Criteria: All sections are labeled.

Scoring: 0 or 1

- 0 marks if the sections of the plan were not numbered as outlined in *The MFTIP Guide*.
- 1 mark if the sections of the plan were numbered as outlined in *The MFTIP Guide*.

Review Criteria: The plan is legible.

Scoring: 0 or 1

- 0 marks if the plan is overly messy or difficult to follow.
- 1 mark if the plan is legible.

Review Criteria: The plan has sufficient content and detail to facilitate resource management activities.

Scoring: 0 to 5

- relative score based on review of overall plan contents.

Review Criteria: Approval form is complete and accurate

Scoring: 0 or 1 (Mandatory Item)

- 0 marks if review criteria not satisfied
- 1 mark if Approval form is complete and accurate

Review Criteria: Area Verification form is complete and accurate for each roll number

Scoring: 0 or 1 (Mandatory Item)

- 0 marks if review criteria not satisfied
- 1 mark if Area Verification form is complete and accurate for each roll number

Review Criteria: Application form is attached, completed, and signed.

Scoring: 0 or 1 (Mandatory Item)

- 0 marks if review criteria not satisfied
- 1 mark if Application form is attached, completed, and signed

Managed Forest Plan Review Form

Total Score: _____ **Total Points Available:** _____ **%**
Mandatory Items Missing: _____ **(# of 0's)**
 Plan meets **minimum** standards: **Y** **N**

Landowner: _____ **Plan Number:** _____
Plan Approver: _____ **Approver Number:** _____
MNR Reviewer: _____ **MNR District:** _____
Phone Number: _____ **Date Reviewed:** _____

Please refer to the *Standards And Review Criteria for Managed Forest Plans Prepared Under the Managed Forest Tax Incentive Program* for an explanation of the Review Criteria.

Section 1: Property owner information	Points Available	Actual Score
• The dates for the 20-year plan period and the period of 10-year management activities are correct.	0 <u>to</u> 1	
• Section 1.1 The Registered Property Owner(s) is/are listed with the required information.	0 <u>to</u> 1	
• Section 1.2 The name of the person(s) who prepared the plan is/are listed with the required information.	0 <u>or</u> 1	
Comments: ■		

Section 2: Property location information		
• Section 2.1 The required information is recorded (<i>deduct 0.5 marks for each missing requirement</i>).	0 <u>to</u> 2	
• Section 2.2 Relevant legislation is listed.	0 <u>to</u> 3	
Comments: ■		

Section 3: Property history		
• Section 3.1 A general description of past activities on the property is presented.	0 <u>to</u> 2	
• Section 3.2 The importance of the property to the surrounding landscape is discussed..	0 <u>to</u> 2	
Comments: ■		

Section 4: Property map and the surrounding area		
• The map is of sufficient quality to allow the property to be located and for MFTIP eligible portions and the ineligible portions to be located. (<i>0 – missing Mandatory Item, 5 - Mandatory Item present or 10 – Mandatory Item present and standard mapping practices are used</i>).	0 <u>or</u> 5 <u>or</u> 10 <i>Mandatory Item</i>	
Comments: ■		

Section 5: Landowner objectives		
• Section 5.1 The priority of objectives are ranked.	0 <u>or</u> 2	
• Section 5.2 The plan explains why each objective listed in Table 5.1 is important to the landowner.	0 <u>or</u> 2 <u>or</u> 4	
• Section 5.3 The strategies listed are realistic and compatible with the objectives.	0 <u>or</u> 2 <u>or</u> 4	
Comments: ▪		

Section 6: Detailed property map		
• The forested land is divided into compartments based on species composition, stand condition, age, etc.	0 <u>or</u> 2 <u>or</u> 4	
• The map uses standard mapping procedures (<i>deduct 0.5 marks for each missing requirement</i>).	0 <u>to</u> 2	
Comments: ▪		

Section 7: Managed Forest Compartment Descriptions (Getting to know...)		
• The compartment is eligible for the MFTIP and the two types of open area compartments (if present) are mapped as discreet units (<i>0 – missing Mandatory Item <u>or</u> 5 – Mandatory Item present <u>or</u> 10 –, Mandatory Item present the inventory clearly demonstrates eligibility (relative term based on reviewers expertise)</i>).	0 <u>or</u> 5 <u>or</u> 10 <i>Mandatory Item</i>	
• Section 7.1 The Compartment number/name and associated area are presented.	0 <u>to</u> 2	
• Section 7.2 The Compartment characteristics section is completed.	0 <u>to</u> 2	
• Section 7.3 The Compartment history is completed and is more specific than the property history.	0 <u>to</u> 2	
• Section 7.4 A compartment inventory is presented for each compartment being entered into the MFTIP and the inventory should reflect the management objectives and planned activities (<i>0 – missing Mandatory Item <u>or</u> 5 – Mandatory Item present <u>or</u> 10 – Mandatory Item present and the inventory is “comprehensive” (relative term based on reviewers expertise)</i>).	0 <u>or</u> 5 <u>or</u> 10 <i>Mandatory Item</i>	
• Section 7.5 If the landowner’s objectives include wildlife habitat and/or environmental protection Section 7.5 should be completed.	0 <u>or</u> 2	
• Section 7.6 The Long term objectives and Short term activities section is completed (<i>0 – missing Mandatory Item <u>or</u> 5 – Mandatory Item present <u>or</u> 10 — Mandatory Item present with reference to “good forestry practices”</i>).	0 <u>or</u> 5 <u>or</u> 10 <i>Mandatory Item</i>	
Comments: ▪		

Section 8: The Ten year activity summary - summarizes the activities by compartment.		
The Proposed Ten-Year Activities summarize the activities by compartment (<i>0 – missing information or 5 – contains all information, but vague or confusing targets or schedules or 10 – complete with quantifiable measures and schedules</i>).	0 <u>or</u> 5 <u>or</u> 10 Mandatory Item	
Comments: ▪		

Section 9: Report of activities		
• The Report of activities section is attached.	0 <u>to</u> 2	
Comments: ▪		

Section 10: Contacts and references		
• The Contacts and reference section is attached.	0 <u>to</u> 2	
Comments: ▪		

Overall plan quality		
• All sections are labeled.	0 <u>or</u> 1	
• The plan is legible.	0 <u>or</u> 1	
• The plan has sufficient content and detail to facilitate resource management activities.	0 <u>to</u> 5	
• Approval form is complete and accurate.	0 <u>or</u> 1 Mandatory Item	
• Area Verification form is complete and accurate for each roll number	0 <u>or</u> 1 Mandatory Item	
• Application form is attached, completed and signed.	0 <u>or</u> 1 Mandatory Item	
Comments: ▪		

Recommendations: