

Family Forests Alliance

Forest Management Certificate Holder Questionnaire Results

October 20, 2009

Prepared by the FSC Family Forests Alliance
<http://www.familyforestsalliance.org>

Table of Contents

Executive Summary	3
Background	4
Results	4
Group Manager Responses	5
Group and Single Certificate Responses	11
Appendix A: Questionnaire	17

List of Tables

Table 1. Group Forest Management Certificates Represented by the Questionnaire.....	4
Table 2. Group Certification Costs	9

List of Figures

Figure 1. Changes in Membership	5
Figure 2. Group Member Services.....	6
Figure 3. Level of Satisfaction with Services	7
Figure 4. Group Certification Challenges.....	7
Figure 5. Tool and Resource Interests	8
Figure 6. Perception of Costs Compared to Benefits.....	9
Figure 7. Prediction of Change in Financial Benefits of Certification	10
Figure 8. Perceived Benefits	11
Figure 9. Perceived Downsides.....	13
Figure 10. Interest in Services	14

Executive Summary

Beginning in July 2009, the FSC Family Forests Alliance invited feedback from FSC Forest Management (FM) Certificate holders in the United States regarding their experiences and perceived costs and benefits of FSC certification. The questionnaire was also specifically intended to increase the understanding of group certification experiences and trends in the United States. As of September 30, 2009, a total of 65 responses were received, including responses from 55 different certificate holders. At the time the questionnaire was established there were a total of 114 FM certificate holders in the U.S for a total response rate of 48% (55/114). Of the 65 responses received, 25 were from group FM certificates, representing 21 different group certificates. The total number of group certificates in the U.S. is estimated to be 40.¹

The group certificates represented in the questionnaire responses indicated having a total of about 1.6 million acres enrolled with about 51,000 acres as designated High Conservation Value Forest (HCVF). Half of the group members reported increases in membership in the past 12 months. About three-quarters of the groups provide both marketing and management planning services to their members and are generally satisfied with the services they are currently able to provide. Nearly 90% of the groups reported challenges with the “lack of markets for certified products”, while 72% also reported “high audit costs” as a challenge. More than 80% of the responding groups indicated an interest in the development of tools and resources related to “carbon offset aggregation project development”.

Reported group certification costs were highly variable. The median reported initial assessment cost was \$6,000 (ranging from \$1,400 to \$50,000); the median annual audit cost was \$2,700 (ranging from \$200 to \$15,000); the median annual operating costs were \$18,000 (ranging from \$500 to \$250,000) and the annual marketing and promotion costs were reported at \$1,200 (ranging from \$0 to \$100,000).

The majority (75%) of group certificate holders reported “certification costs greatly exceed financial benefits” and 76% believe the financial benefits of certification will either increase or stay the same over the next five years.

The most recognized benefit for certification reported by all respondents (including both single and group FM certificate holders) was “new marketing opportunities”. The most widely perceived downside to certification is the “additional cost”. Forest Management Certificate holders are most interested in services related to the “marketing of certified products” and several general written comments emphasized a perceived role for FSC in the marketing and promotion of certified products.

In general, the results of the questionnaire provide useful information and insights for evaluating the perceived strengths and weaknesses of FSC forest management certification in the United States, including the specific perceptions of group managers and the challenges related to group certification.

¹ The occurrence of a certificate being issued as a group certificate is not consistently reported. The estimate of 40 group certificates in the U.S is based upon information available from FSC and FSC-US and the results of this survey.

Forest Management Certificate Holder Questionnaire Results

Prepared by the FSC Family Forests Alliance

Background

Beginning in July 2009, the FSC Family Forests Alliance invited feedback from FSC Forest Management (FM) Certificate holders in the United States regarding their experiences and perceived costs and benefits of FSC certification. The questionnaire was also specifically intended to increase the understanding of group certification experiences and trends in the United States. The questionnaire was available online. Invitations to participate were distributed via email and follow-up phone calls were also made with some questionnaires being completed during phone interviews. Publicly available contact information for certificate holders (e.g., information available at the FSC-US website) was used in contacting the intended respondents. Appendix A includes the complete questionnaire.

Results

As of September 30, 2009, a total of 65 responses were received, including responses from 55 different certificate holders. At the time the questionnaire was established there were a total of 114 FM certificate holders in the U.S for a total response rate of 48% (55/114).

Of the 65 responses received, 25 were from group FM certificates, representing 21 different group certificates (Table 1).

Table 1. Group Forest Management Certificates Represented by the Questionnaire

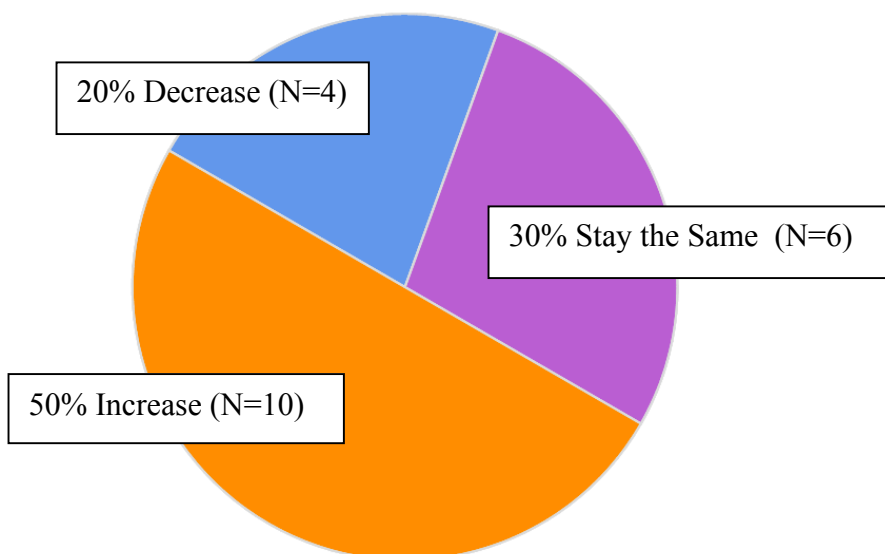
1. Aitkin County Soil and Water Conservation District
2. Blencowe and Associates
3. Clearwater Forest Consultants, LLC
4. Columbia Forest Products - Appalachian Region
5. Community Forestry Resource Center
6. Edward S. Kocjancic, Inc.
7. Finch Paper LLC
8. Fountains Forestry Inc.
9. Hickman Timber Mgmt/Lumber Co.
10. Keith Horn, Inc. Consulting Foresters
11. Mendocino Resource Mang. Cert Program
12. Michael Howell Forestry Consultants
13. Northwest Natural Resource Group
14. Prentiss & Carlisle Management Co.
15. Red Rock Enterprises for Mid-Atlantic Timber Group
16. Restoration Forestry, Inc.
17. Southern Forests Network
18. The Nature Conservancy
19. The Trust to Conserve Northeast Forestland
20. Trout Mountain Forestry
21. Two Trees Forestry

Group Manager Responses

Of the 25 responses, 20 were from certificates that include private landowners/managers as group members and 5 were from certificates that include public and private landowners/managers. The group certificates represented in the responses indicated having a total of about 1.6 million acres enrolled with about 51,000 acres as designated High Conservation Value Forest (HCVF). The group certificates represented a total of 19,905 members; however 19,525 group members are associated with a single certificate.² The group membership sizes ranged from 4 to 19,525 with the median membership size from the 25 responses being 10. Figure 1 illustrates the responses related to recent changes in membership, including 50% of responses reporting an increase in membership in the past 12 months.

Figure 1. Changes in Membership

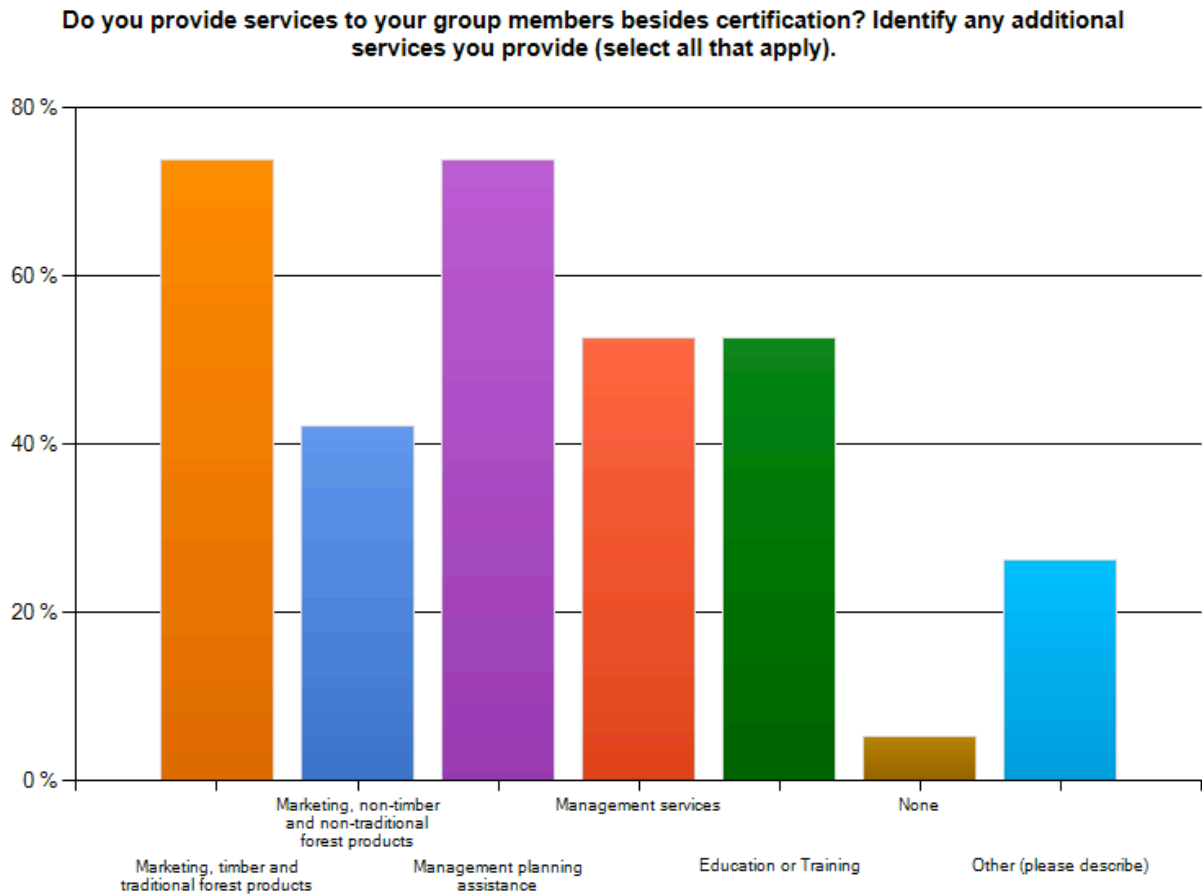
In the past 12 months, have you seen membership in your group increase, decrease or stay the same?



In terms of membership eligibility, 7 (35%) responses indicated membership is restricted to properties less than 2,500 acres in size; 2 (10%) indicated membership is restricted to properties greater than 2,500 acres in size and the majority of responses (N=11, 55%) indicated no restrictions on size. Those with size restrictions primarily indicated the reason to be “Follows the FSC Small, Low Intensity Managed Forests (SLIMFs) policy” (N=5) or “Targets the landowner group we are most interested in serving” (N=2).

Figure 2 illustrates the services groups are currently providing to members. An equal number (N=14, 74%) indicated providing “Management Planning Assistance” as well as “Marketing, timber and traditional forest products.”

² The next highest reported membership was 120.

Figure 2. Group Member Services

Other group member services identified in responses included:

- Regeneration
- Forest Pest Management
- Working forest conservation easements
- Carbon assessment
- Informal training related to FSC and preparation for inclusion in group certificate
- Ecosystem service program and market development
- Referrals
- Road construction and other conservation construction activities compliant with BMP's

In terms of the level of satisfaction with current services, most responses indicated satisfaction with current services in all areas except for some weaknesses in the marketing of non-timber and non-traditional forest products (Figure 3).

Figure 3. Level of Satisfaction with Services

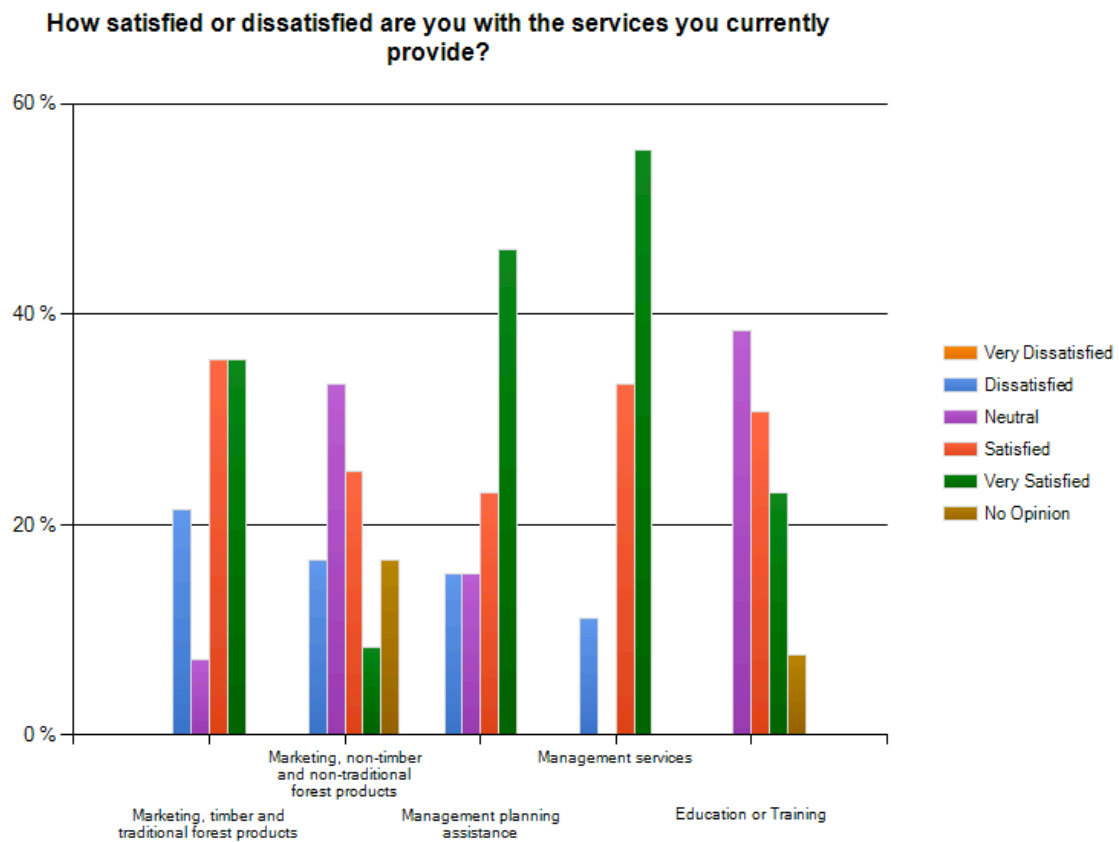
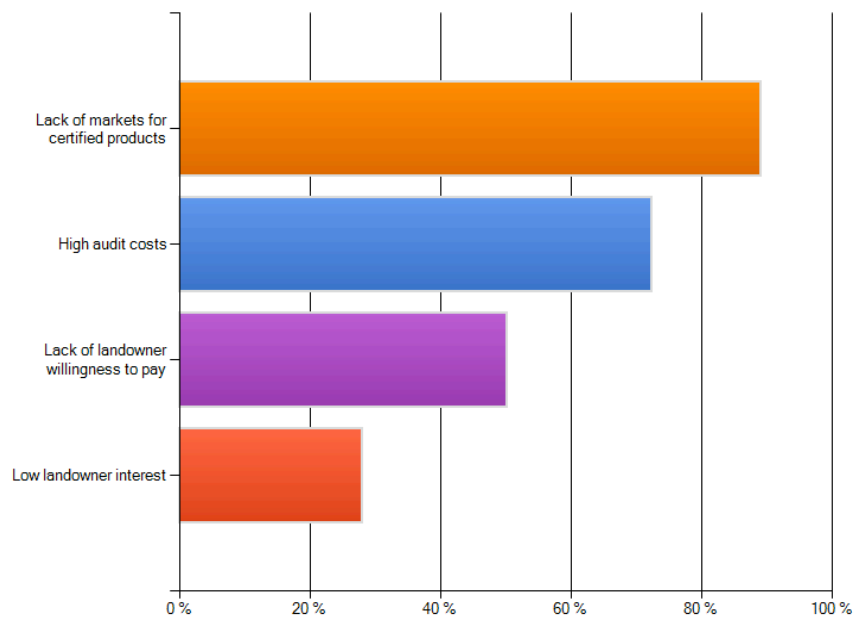


Figure 4. Group Certification Challenges

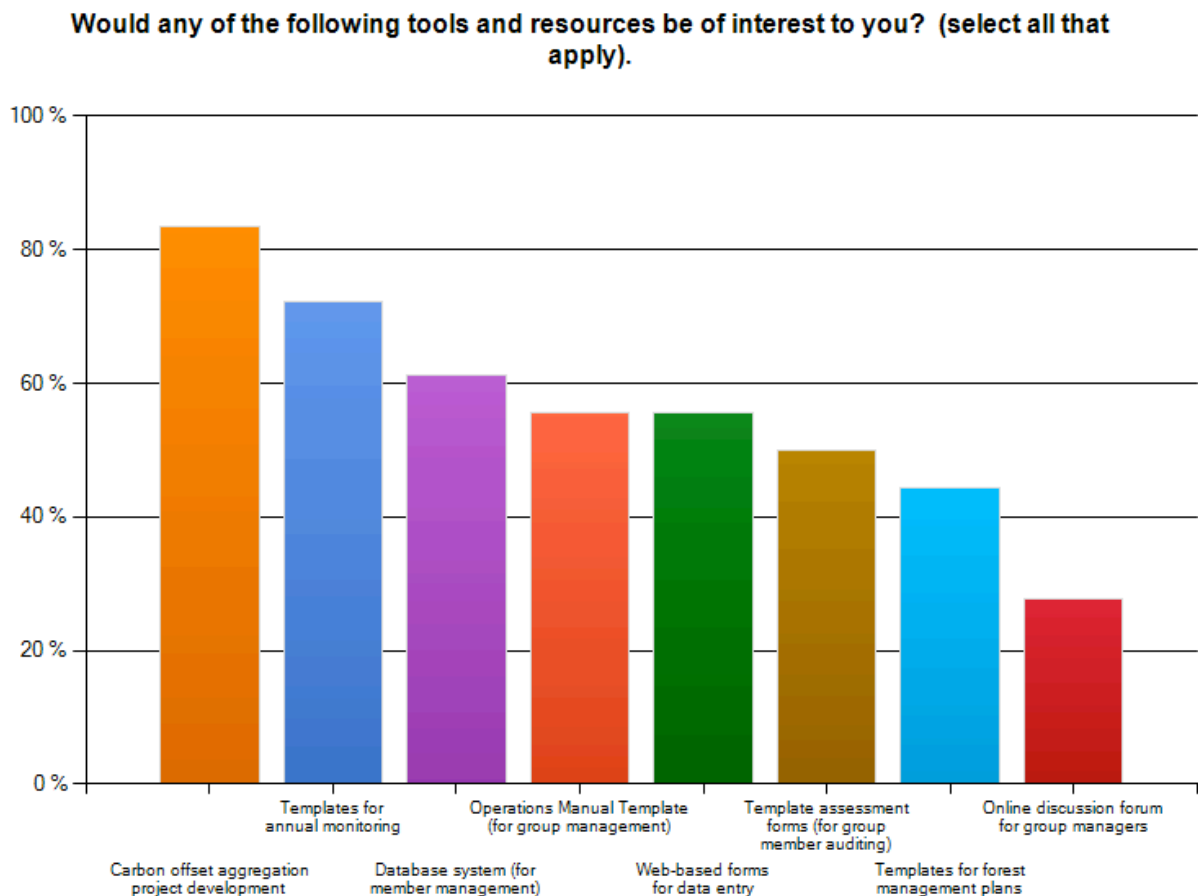
Have you encountered any challenges with your group certificate? (select all that apply).



In the responses to the question about group certification challenges, 88.9% reported a challenge with “lack of markets for certified products” (Figure 4). The challenge of “high audit costs” was reported by 72% of respondents. Other challenges and comments provided in response to the question included:

- There is no support from any direction. FSC does not provide any support, the state doesn't, industry doesn't, our peers don't.
- I bear the costs of my certificate. The audit process needs to be streamlined so we do not have to re-invent the wheel each year, or more so each 5 years.
- [A challenge is the] personal influence of auditors
- Lack of concern from FSC and others that FSC is creating a system that further marginalizes the majority of community-level stakeholders; Lack of support from those who are determining how FSC will work in the U.S.- it really feels like FSC and others have decided not to support community-based efforts to facilitate access
- [A challenge is] reaching new landowners [and] developing relationships with them.

Figure 5. Tool and Resource Interests



The tool or resource of most interest to the group certificate holders was the “carbon offset aggregation project development” with 83% indicating interest in this while 72% were interested in “templates for annual monitoring”, the second most popular response. Most respondents indicated no

opinion in terms of their level of satisfaction with their current tools and resources in these categories, perhaps indicating that they largely do not exist or are not currently being used by certificate holders.

Responses regarding costs associated with the group certificates are summarized in Table 2.

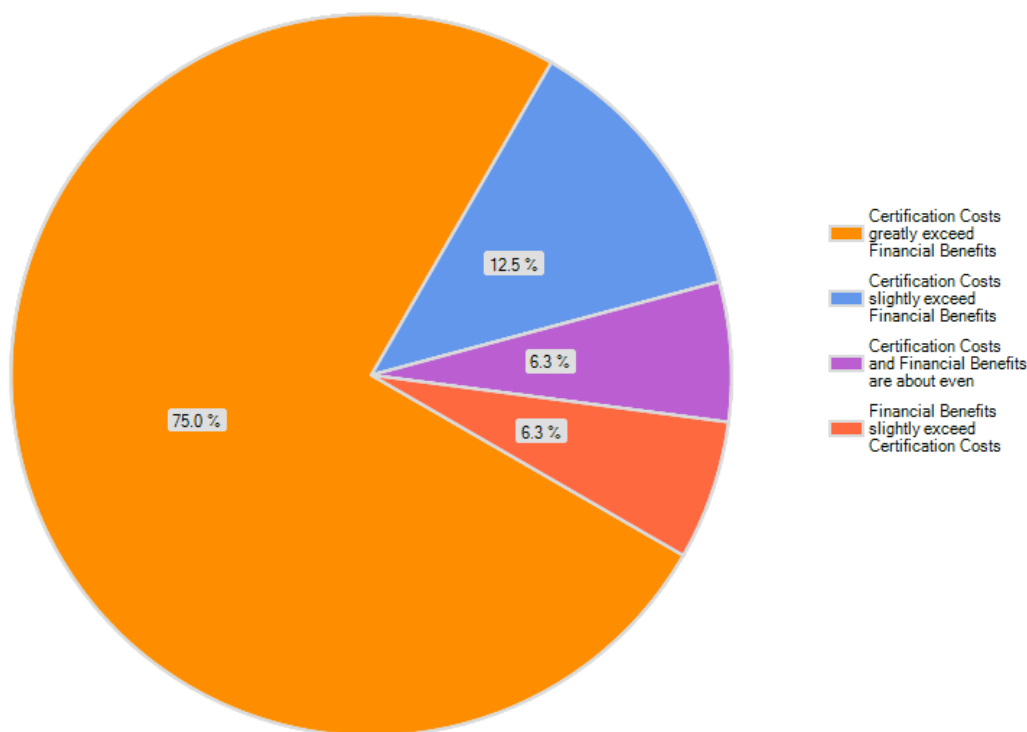
Cost Category	Minimum Reported	Maximum Reported	Average Reported	Median Reported
Initial Assessment	\$1,400	\$50,000	\$12,910	\$6,000
Annual Audit	\$200	\$15,000	\$4,381	\$2,700
Operating Costs	\$500	\$250,000	\$48,750	\$18,000
Marketing Costs and Promotion	\$0	\$100,000	\$14,810	\$1,200

Responses related to the *annual costs per group member* were highly variable. No one reported annual costs being less than \$100 per group member per year (N = 0). An equal number (20%, N=3) reported costs of “between \$100 and \$250 per group member per years” as reported costs of “more than 1,500 per group member per year”.

A total of 75% of responses (N=12) indicated “Certification Costs greatly exceed Financial Benefits” (figure 6). In terms of the outlook for financial benefits from certification over the next five years, responses were fairly split between a prediction of increased financial benefits and an expectation that the financial benefits will stay the same (Figure 7).

Figure 6. Perception of Costs Compared to Benefits

In general, how do the total costs of certification compare to the financial benefits each landowner realizes?

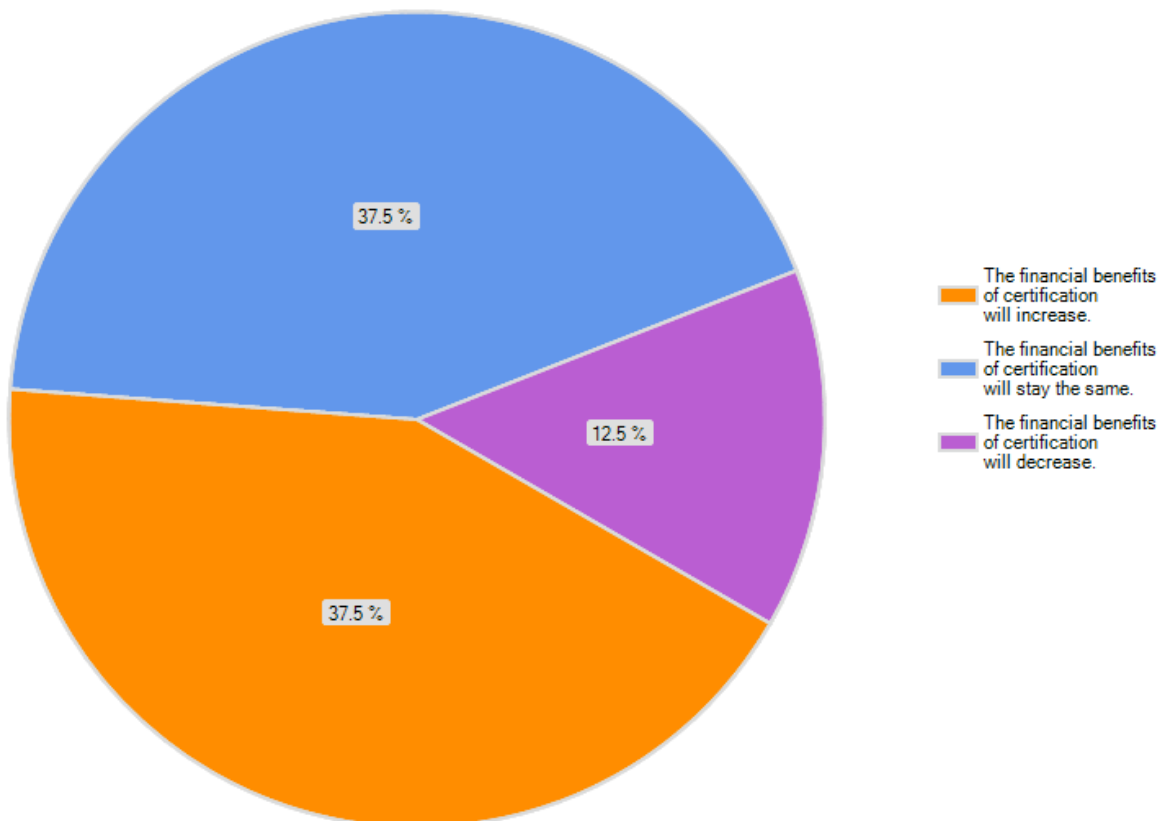


Some of the comments related to this question (Figure 6) included:

- No member has realized any financial benefit what so ever to date from their certification. There exists no premium for certified wood.
- Essentially, financial benefits are zero.
- Highly variable. Benefits to our municipal clients are indirect but significant; clients who participate in our...marketing program receive significant direct financial benefits; clients who don't participate [in our marketing program] have few benefits, non-clients have costs without direct benefits.
- We are starting to see more interest in purchasing certified products resulting in market access rather than increase price in this depressed market.
- We have yet to see a market benefit of more than e few hundred to a couple thousand dollars on any single timber sale.
- I do not charge landowners a fee for participating in the FSC program. I consider it part of my overhead, though I only invite new members into the program if there is an advantage to their participation (sell wood for an FSC premium, offer towns the opportunity to join as part of a bid proposal, etc.). New members raise auditing costs.

Figure 7. Prediction of Change in Financial Benefits of Certification

In general, how do you think the financial benefits of certification will change over the next five years?



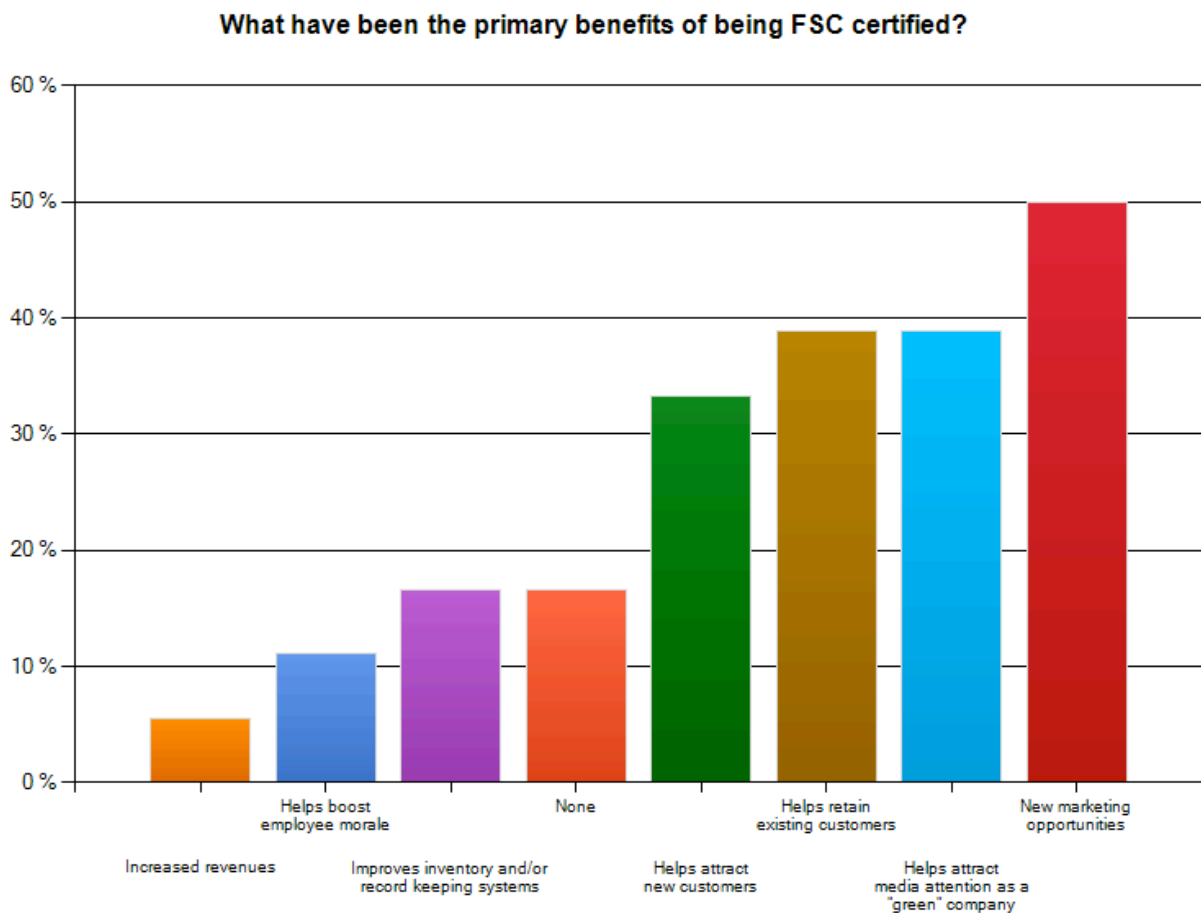
Comments in response to the prediction of change in the financial benefits of certification (Figure 7) included:

- We're finally seeing some real movement on certification in the [region] after years of being ignored.
- My best guess is status quo. No premium for FSC certified wood. I fully expect biomass markets will come in strong as soon as the economy begins growing again, and petroleum prices rise, meaning more clearcutting and high grading, more of the same misuse and abuse we've had over the last century. FSC is of little consequence here.
- If the audit process and the prescriptive approach of FSC rulings continue to increase, costs will rise, and thus financial benefits will decrease even further.
- The FSC log/lumber markets seem poised for real growth.
- If benefits don't increase and costs continue to increase, many certificate holders will drop the program

Group and Single Certificate Responses

The remaining questions were asked of both group and single certificate holders.

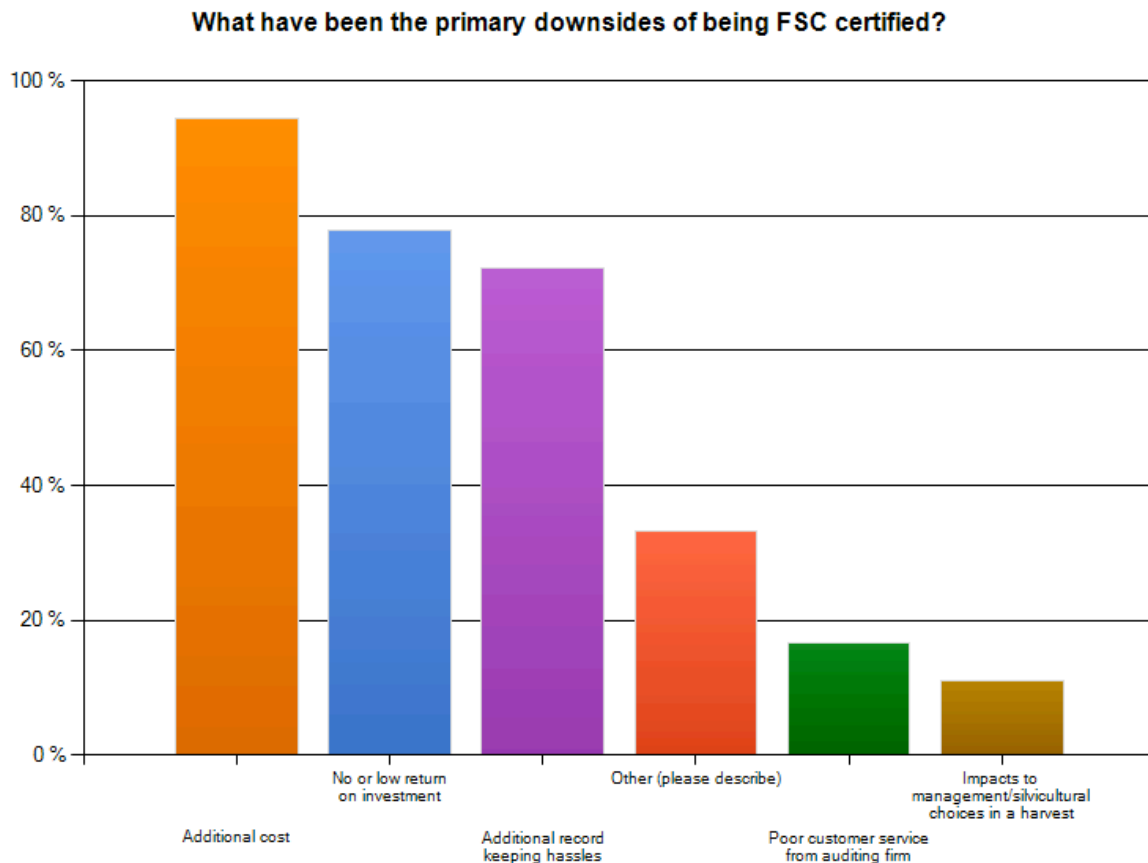
Figure 8. Perceived Benefits



Additional comments related to the perceived benefits of FSC certification included:

- Personal prestige and long-term commitment to an idea (15 years).
- Financially it's been a huge loss. Without financial gain, employees grouse about the merit in continuing. We don't stand out to the media, the public, the state forestry agency, the industry, and we get only token compliments from a very few select individuals from environmental groups.
- It makes me feel good to know that my lands are FSC-certified. Unfortunately, that does not pay the bills.
- The opportunity to help FSC evolve as a system that truly creates triple bottom line sustainability
- Most benefits are not market-based, for family forest landowners. Many landowners value these benefits, but the "true cost" of FSC certification brings them in too high. FSC certification is built on the assumption of market products coming from certified lands: many Family Forest landowners are more interested in non-market, (or at least non-traditional) forest products. Certification and its high costs don't match this well.
- There are many potential benefits, but few real ones.
- We use it as a tool to prevent landowners from making poor short term management decisions.
- Providing a model for group certification for landowners in the midwest.
- We are a sustainability non-profit. Our "benefits" are not marketing or profit-based opportunities, as your questions imply. Rather, we've been in FSC to promote sustainability and to educate landowners and the general public about sustainable forest practices, markets and products.
- Improved our forestry practices, provides validation of our approach
- Provides third-party stamp of approval for an NGO managing working forestlands.
- Our BMP implementation, especially around water, improved considerably once we became involved with FSC.
- In certain cases, FSC has helped us retain access to markets, but not across the board.

Figure 9. Perceived Downsides



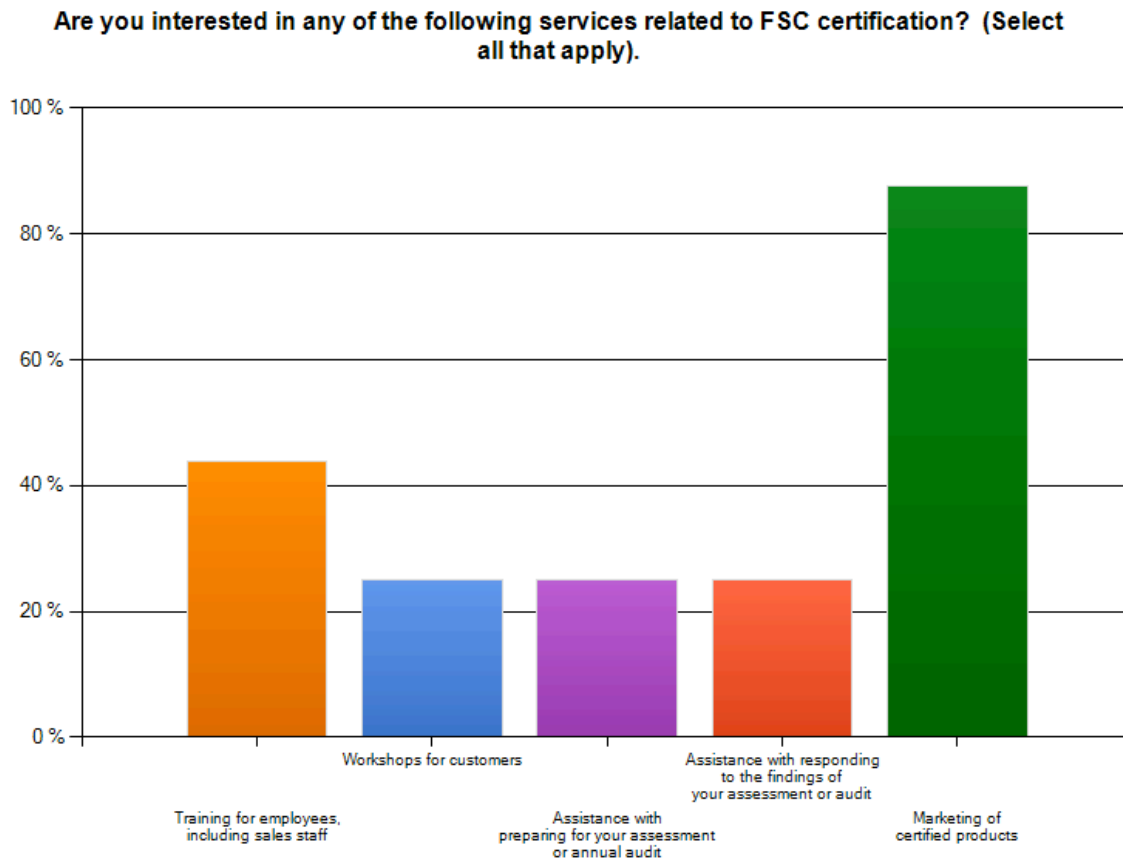
Additional comments related to the perceived downsides of FSC certification included:

- Time demand on audit preparation and implementing certification.
- Huge capital investment in a system that seems to have completely divested itself from the interests of community-level stakeholders
- We do many things to satisfy audits and auditors that add no value to our landowners - we are assuring against forest management risks that are not relevant to their management objectives.
- Competition and political resistance from competing systems (SFI and ATFS).
- Negative return on investment
- Every year, I get a little more bummed out with FSC. I sense a growing regulatory bureaucracy (with which I am very familiar in California) that returns little to their "clients" (Certified managers & landowners). Yet, I remain certified because I believe in the essence of the concept and continue to hope that FSC will turn things around.
- Being invited to participate in surveys, like this one. Probably once a month a student/researcher calls seeking input for their work. Some months it gets pretty old. I am frequently asked to join one group or another, to represent the FSC cause.
- Continued changes of standards and procedures demanding more time in an era where sound on the ground management is nearly totally consuming in itself.
- The "documentation-based" forest verification system does not mesh well with certain "traditional land managers". We explored extensively, and ultimately abandoned the idea of

certifying certain well-managed Native American-owned lands in our area...this was mutual agreement.

- In cases where documentation helps us keep track of things, that's a positive. Where it has been documentation for its own sake, that's a problem.
- The costs must be held in line for certification to be sustainable

Figure 10. Interest in Services



Respondents were asked to indicate whether or not they are interested in any services related to FSC certification. The results are shown in Figure 10, with 88% indicating interesting in services related to “Marketing of certified products”. Additional comments related to this question included:

- I feel that FSC has an obligation to market the products upon which they base their business.
- Assistance with promoting FSC certification to forest owners, the public, state and federal agencies, any one who could potentially become a client or refer a client. Pre-packaged ads we could fill in the blanks and ship off to a magazine or newspaper or radio.
- Working with other group managers with similar goals to develop the technology resources we need and effectively advocate for fair FSC policy
- National level infrastructure (ie database of group members w management planning capacity)
- Free up the use of the logo for reasonable applications. The copyright "protection" is suffocating and hurts FSC.

- FSC must market the program. Got Milk?, Where's the Beef? Beef-It's What's for Dinner. Pork-the other white meat, we need a major national marketing campaign.
- FSC needs to get out of the ivory tower and get into the market place. If you truly want to change the way people practice forestry, there has to be a financial incentive. Their products have to be valued at a level commensurate with the extra effort and work that goes into a certified operation. FSC needs to go to bat for those of us who pay the fees that finance their program.

Additional general comments provided by respondents included:

- I have been working with FSC since 1994 and have only had positive experiences with FSC. I was certified until 4 months ago for the last 10 years by the SmartWood organization. I have been quite underwhelmed by their service. In a recession (and timber depression), their idea of long-term customer service was to charge me for a yearly audit and a recertification within 3 months of each other instead of combining the activities. And this after never having received a single service (as there are no certified mills within trucking distance) - only bills.
- On the positive side it has helped us become better organized and better managers. But it has been expensive and frustrating as well. FSC has failed to market their own program, and we, a small business, cannot afford to do it for them. We're the ones trying to make this happen where we are, with no visible or meaningful support. The investment is not paying off for us. The obsessive logo use restrictions have further complicated the issue, making it difficult to use the FSC accreditation to our advantage and that of FSC, a mutual benefit. Only recently has one email from FSC indicated a more congenial path, but by now I'm worn out by things FSC and probably will not be continuing. The changes and information overload on a small business are overwhelming. There are significant differences in the findings from one auditor to the next, just one more straw. I believe FSC is the gold standard, but there are serious gaps. I've invested thousands of dollars and untold time with little or no payback. Good feelings don't pay the bills.
- The criteria bar continues to rise with time
- Over the past 12 years, generally, disappointing. Due to the high cost, audit hassles, high harvest standards, etc., I have always felt we should either get more money for our logs or some form of regulatory relief. We have obtained neither. What is most discouraging is there really does not appear to be an attempt on the part of FSC to really justify participation in the program.
- It is theoretically a valid market-based solution for internalizing the many external costs associated with forest products and fostering ecological, social, and economic sustainability in the industry. However, FSC's decisions regarding policy and specifically their approach of empowering corporate interests while failing to support community-based stakeholders seeking to build local infrastructure to facilitate access for local producers has resulted in a system that further marginalizes community-level stakeholders such as family forest owners, forest workers, and locally-owned chain of custody businesses.
- We have tried to provide a low-cost model for certification that is accessible to landowners, but the costs associated with maintaining the program are quite high. We have also had several instances where it is difficult for a landowner to do very minor management (planting some trees, etc.) due to the amount of paperwork involved in maintaining certification.
- It is not well-g geared to Family Forest lands. The cost of the verifications do not match well with smaller private land holdings. The trademark "protection" is cramping publicity and

limiting the value (and visibility) of FSC to the general public. The auditors themselves have been professional and good to work with.

- FSC has compelled better management and documentation, even for an organization like TNC, with biodiversity conservation as its mission.
- Group management is very complex and still evolving. The next stage is deciding what we can accomplish at the national level to streamline local and regional groups.
- The costs in assessment /auditing fees(18% increase this year) and in our time responding to new an/or changing requirements continue to increase to the point where we must consider withdrawing from the program.
- Forest owners are not aware of FSC. We are the ones telling them, and trying to sell them on the program. Very few forest owners even want a forest management plan, fewer still want to actually pay for it, and even fewer want to pay extra for the extra effort of a gold standard FSC plan. Again, we, the lone voice in the wilderness, are burdened with all the promotional costs of the FSC system.
- We are winding down our certificate. The costs are too high for us as a non-profit to continue to subsidize. It is ironic, that as FSC is spreading (primarily due to Time-Warner and the paper industry) that market benefits are still insufficient to support smaller private land certifications.
- We have to place the perceived need in the minds of the forest owning population. There must be demand by end users for certified wood, creating demand on industry, and concomitant interest in getting involved. FSC needs to do a major marketing effort.
- I still like FSC, I still think it's the gold standard of forest certification, but it's worn me out financially and otherwise.
- If FSC is to be successful in California, they must:
 1. Market the products they support; for either market share or increased value.
 2. Dirty their hands in the politics of California forestry. This means that FSC needs to convince both the public and the regulatory agencies that the forestry they condone is as good as they claim it is. Otherwise, FSC is acting in a vacuum. If done, this would lead to regulatory relief for those who practice this type of forestry, and would offer an incentive to upgrade forestry practices (presumably FSC's goal). FSC would thus gain a much-needed level of credibility.
- Often find myself questioning the benefits of certification in a time when information continues to pull the resource manager away from the resource and into the office and computer(ie: completing this survey at 9:00 pm at home)

Appendix A: Questionnaire

Coverletter:

Please accept this invitation to participate in a survey that will help improve the understanding of FSC forest management certification in the U.S. You are receiving this invitation because you are identified in the publically available information from FSC-US as the contact person for an active FSC Forest Management certificate in the U.S.

This survey aims to better understand certification in the U.S. and **every response is important**. The survey should take less than 15 minutes to complete.

You can complete the survey at this link:

<https://www.surveymonkey.com/...>

The survey is being conducted by the FSC Family Forests Alliance. More information about the Alliance is available at <http://www.familyforestsalliance.org>

If you have questions, please call 612-333-0430 or email info@dovetailinc.org

Thank you in advance for taking the time to respond to this request.

Sincerely,

FSC Family Forests Alliance

Part 1. Certificate Overview

1. Please select your organization from this list of FSC Forest Management Certificate holders in the U.S.

Aitkin County Land Department
Aitkin County Soil and Water Conservation District
Anderson-Tully Company
B&R Woodland Management
Baskahegan Company
Baxter State Park
Bevan Forestry
Big Creek Lumber Company
Big Creek Resource Managers
Blencowe and Associates
California Polytechnic State University Foundation
Cass County Land Department
City of Astoria
City of Seattle Cedar River Municipal Watershed
Clearwater Forest Consultants, LLC
Collins Almanor Forest
Collins Group Certification Program
Collins Lakeview Forest
Collins Pennsylvania Forest (Kane)
Columbia Forest Products - Appalachian Region
Commonwealth of Massachusetts
Commonwealth of Pennsylvania
Community Forestry Resource Center
Confederated Tribe of the Warm Springs Reservation
Conservation Forestry, LLC
Digger Mountain Forestry LLC
Downeast Lakes Land Trust
Duke University, Duke Forest
Dwight Lewis Lumber Company, Inc.
E. Tunheim-Consulting Forester
Edward F. Kocjancic, Incorporated
Essex Timber Company
Essex Timber Company, LLC
Finch Pruyn & Company, Inc. - Woodlands
Firth Family Foundation
Forest Management of North Carolina State Univ.
Fort Bidwell Indian Reservation
Fort Lewis Military Installation
Fountains Forestry Inc.
GreenWood Tree Farm Fund LP
Hancock Land Company
Hickman Timber Mgmt/Lumber Co.

Hoopa Valley Tribal Council
Hull Forestlands, LP
Indiana DNR, Division of Forestry
Integrated Resource Management
J-Spear Ranch Co.
J.M.L. Heirs, LLC
Kamehameha Schools
Kearse Land and Timber Corp.
Keith Horn, Inc. Consulting Foresters
Keweenaw Land Assoc., Ltd.
Lake County Land Department
Langley Park Associates
Lyme Northern Forest Fund - Chateaugay Woodlands
Lyme Northern Forest Fund, CT-Lakes
Mark S. Andre, RPF
Marsh-Billings-Rockefeller National Hist. Park
Massachusetts Woodland Cooperative
McCloud Tree Farm
Meadowsend Timberlands/Ecosystem Management Co.
Mendocino Redwood Company
Mendocino Redwood Resource Manager Cert. Program
Menominee Tribal Enterprises
Michael Howell Forestry Consultants
Michigan Department of Natural Resources
Mid-Maine Forestry
Minnesota Department of Natural Resources
New England Forestry Consultants, Inc.
New England Forestry Foundation
NewPage Wisconsin System Inc.
North Carolina Div. Of Forest Resources
Northwest Natural Resource Group
Paul Smith's College
Phil Nemir
Pioneer Forest
Potlatch Forest Holdings Resource Mgmt Idaho Unit
Potlatch Forest Holdings, Inc.
Potlatch Forest Holdings, Inc. Arkansas Unit
Prentiss & Carlisle Management Co.
Red River Forests Partnership
Red Rock Enterprises for Mid-Atlantic Timber Group
Redstart Forestry Inc.
Redtree Properties, LP
Residents' Committee to Protect the Adirondacks
Restoration Forestry, Inc.
RMC Pacific Materials Inc. dba CEMEX
Roseburg Resources Company
Roy O. Martin Lumber Company LLC

Saint John's Abbey
Seven Islands Land Company-Pingree Fam.
Shasta Forests
Southern Forests Network (FM)
State of Maine
State of Maryland Chesapeake Forest Project
State of MD Chesapeake Forest Project
State of New York DEC
State of Wisconsin Department of Natural Resources
Staub Forestry & Env. Consulting
Tennessee Dept. of Agriculture
The Conservation Fund-North Coast Forest Cons.
The County of Itasca
The Forestland Group, LLC
The Nature Conservancy
The Trust to Conserve Northeast Forestland
Trout Mountain Forestry
Two Trees Forestry
Wagner Forest Management, LTD
Washington Department of Natural Resources
Willapa Land and Dendrology Corporation
Wisconsin DNR, County Forest Program
Wisconsin DNR, Div. Of Forestry
Wylatti Timber Mngmnt. Co. Ltd.
Yale Univ. School of Forestry and Env. Studies

If your organization is not listed, please enter your organization name and contact information here:

2. What year was your certificate first issued?

3. Does your organization hold an FSC **Group** Forest Management (FM) (also known as a Resource Manager (RM) Certificate)?
 - a) Yes
 - b) No

4. Please select the category that best describes the FSC certificate held by your organization – select only one
 - a) Single Certificate for a private organization
 - b) Single Certificate for a public organization
 - c) Group certificate for private landowners/managers
 - d) Group certificate for public landowners/managers
 - e) Group certificate for public and private landowners/managers
 - f) Other (Please describe your certificate if it is different from these categories or includes more than one):

5. What is the total acreage covered by your certificate?
6. How many acres have been designed High Conservation Value Forest (HCVF) in accordance with Principle 9 of the SFC standard?
7. Would you like to make any general comments about your experiences with FSC Forest Management certification?
8. Does your organization hold a group certificate?
(Please answer YES if you have an FSC Group Forest Management Certificate or an FSC Resource Manager Certificate)
 - a) Yes
 - b) No

Part II. Group Certificates

(To be completed by group certificate holders, those answering Yes to Question #8)

As a group certificate holder, please answer the following questions.

9. How many group members do you have enrolled in your forest management group certificate?
Enter Number:
10. In the past 12 months, have you seen membership in your group:
 - a) Increase
 - b) Decrease
 - c) Stay the same

Any comments?

11. Please select the category that best describes your group certificate's eligibility requirements regarding property size.
 - a) Group Certificate for small landowners (eligibility is restricted to properties less than 2,500 acres in size)
 - b) Group Certificate for large landowners (eligibility is restricted to properties greater than 2,500 acres in size)

- c) Group Certificate for small and large landowners (e.g., no eligibility restrictions related to size)
 - d) Other (Please describe your certificate if it is different from these categories or includes more than one)
12. If you restrict the property size for members of your group, please describe the reasons for your property size guidelines:
- a) Follows the FSC Small, Low Intensity Managed Forests (SLIMFs) policy
 - b) Targets the landowner group we are most interested in serving
 - c) Group does not have property size restrictions
 - d) Other Reason, please describe:
13. Do you provide services to your group members besides certification? Identify any additional services you provide (select all that apply):
- a) Marketing, timber and traditional forest products
 - b) Marketing, non-timber and non-traditional forest products
 - c) Manageable planning assistance
 - d) Land management services
 - e) Education or training
 - f) Other, please describe:
14. How satisfied or dissatisfied are you with the services you currently provide?

	Very Dissatisfied	Dissatisfied	Neutral	Satisfied	Very Satisfied	No Opinion
Marketing, timber and traditional forest products						
Marketing, non-timber and non-traditional forest products						
Manageable planning assistance						
Land management services						
Education or training						

Other (please specify):

15. Have you encountered any challenges with your group certificate? (select all that apply)
- Low landowner interest
 - High audit costs
 - Lack of landowner willingness to pay
 - Lack of markets for certified products
 - None
 - Other, please describe:
16. Would any of the following tools and resources be of interest to you? (select all that apply)
- Online discussion forum for group managers
 - Templates for forest management plans
 - Templates for annual monitoring
 - Operations Manual Template (for group management)
 - Template assessment forms (for group member auditing)
 - Database system (for member management)
 - Web-based forms for data-entry
 - Carbon offset aggregation project development
 - None
 - Other, please describe:
17. How satisfied or dissatisfied are you with your current tools and resources?

	Very Dissatisfied	Dissatisfied	Neutral	Satisfied	Very Satisfied	No Opinion
Online Discussion forum for group managers						
Templates for forest management plans						
Operations Manual Template (for group management)						
Template assessment forms (for group member auditing)						
Database system (for member management)						
Web-based forms for data-entry						
Carbon offset aggregation project development						

Other (please specify):

18. What are the approximate costs of operating and managing your group?

Initial Assessment Cost (Year One):

Annual Audit Fees (average, Years 2-5):

Operating Costs (staff, supplies, travel, etc):

Marketing Costs and Promotion (annual costs):

19. What are your estimated average total annual costs of certification per group member (e.g., annual costs per landowner)?

- a) Less than \$100 per group member per year
- b) Between \$100 and \$250 per group member per year
- c) Between \$250 and \$500 per group member per year
- d) Between \$500 and \$1000 per group member per year
- e) Between \$1000 and \$1500 per group member per year
- f) More than \$1500 per group member per year
- g) Highly variable
- h) Don't know

Comments? (You may also provide a description of your cost structure)

20. In general, how do the total costs of certification compare to the financial benefits each landowner realizes?

- a) Certification costs greatly exceed financial benefits
- b) Certification costs slightly exceed financial benefits
- c) Certification costs and financial benefits are about even
- d) Financial benefits slightly exceed certification costs
- e) Financial benefits greatly exceed certification costs

Comments?

21. In general, how do you think the financial benefits of certification will change over the next five years?

- a) The financial benefits of certification will increase
- b) The financial benefits of certification will stay the same
- c) The financial benefits of certification will decrease
- d) No opinion

Comments?

Part III Certification Benefits and Barriers (Asked of all respondents)

22. What have been the primary benefits of being FSC certified? (Select all that apply)

- a) Helps retain existing customers
- b) Helps attract media attention as a "green" company
- c) Helps attract new customers
- d) Helps boost employee morale

- e) Improves inventory and/or record keeping systems
- f) New marketing opportunities
- g) None
- h) Other: (please describe):

Any additional comments related to benefits from being FSC certified?:

23. What have been the primary downsides of being FSC certified? (Select all that apply)

- a) Additional cost
- b) Additional record keeping hassles
- c) Poor customer service from auditing firm
- d) No or low return on investment
- e) Impacts to management/silviculture choices in a harvest
- f) Social conflicts or unintended consequences stemming from meeting the standard
- g) None
- h) Other: (please describe):

Any additional comments about the downsides of being FSC certified?:

24. Are you interested in any of the following services related to FSC certification? (Select all that apply)

- a) Training for employees, including sales staff
- b) Workshops for customers
- c) Assistance with preparing for your assessment or annual audit
- d) Assistance with responding to the findings of your assessment or audit
- e) Marketing of certified products
- f) Other: (please describe):

Any additional comments about this question?:

25. How satisfied are you with your current services?

	Very Satisfied	Dissatisfied	Neutral	Satisfied	Very Satisfied	No Opinion
Training for employees, including sales staff						
Workshops for customers						
Assistance with preparing for your assessment or annual audit						
Assistance with responding to the findings of your assessment or annual audit						
Marketing of certified products						

Other (please specify):

26. Are you interested in receiving additional information about the FSC Family Forests Alliance?

- a) Yes
- b) No

27. Would you like to receive a summary of the results of this survey?

- a) Yes
- b) No

28. Do you have any final comments?

29. Please provide your contact information if you would like to receive information about the FSC Family Forests Alliance and/or results of this survey.

Name:

Organization:

Mailing Address:

City/Town:

State:

Zip:

Email Address:

Phone Number:

Thank you for participating in this survey! If you have any questions please contact us at 612-333-0430 or info@dovetailinc.org.

For more information about the FSC Family Forests Alliance, please visit <http://www.familyforestsalliance.org>

Prepared by the FSC Family Forests Alliance
<http://www.familyforestsalliance>