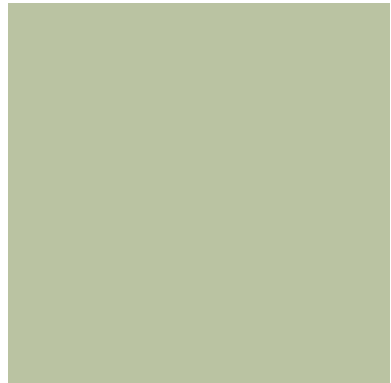




The Center for Private Forests
at Penn State

Strategic Plan 2022-2026



- THE CENTER FOR -
PRIVATE FORESTS

Our Vision

A world where stewardship practices sustain healthy and resilient private forests which contribute to the social, ecological, and economic well-being of society.

Our Mission

Working at the intersection of people and forests, the Center advances research-based insights to inspire and cultivate stewardship of private forests.

Our Values

We believe...

People and Forests

- That stewardship is best accomplished by working at the intersection of people and forests.
- That forest landowners can contribute significantly to forest health, resilience, and vitality.
- That an engaged community is a powerful force in improving forest health and vitality.
- That we have an obligation to conserve forests and their value for future generations.

Working Forests

- That working forests can provide a broad range of economic, environmental, and social benefits to the people who care for them, the wildlife that inhabits them, and society as a whole.
- That working forests are an essential part of the ecosystem on which all of society depends.
- That working forests require active intervention and management to maintain their health, vitality, and capacity to deliver benefits to society sustainably.

Pathways to Stewardship

- That forest stewardship emerges through dialogue and collaboration among landowners, stewardship professionals, and communities.
- That forest stewardship is best achieved by understanding and connecting landowner values to sustainable practices.
- That research focused on interactions among landowners and professionals with each other and with the land is essential in developing the knowledge to catalyze change in the landscape.
- That peer-to-peer education, which combines individual practical experience with knowledge of best practices, is an important tool for inspiring change.



Dialogue and collaboration among landowners, stewardship professionals, and communities are essential for the stewardship of privately-owned forests.



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Founded in 2011, the Center for Private Forests aims to build on the three decades of transdisciplinary research and experience of its founders to ensure the health and vitality of forested landscapes.





Forests occupy 17 million of Pennsylvania's 28 million acres of land, and 12 million of those 17 million acres are owned by nearly three-quarters of a million private forest landowners. These landowners, their land, and the professionals who advise them are the distinctive focus of the Center for Private Forests.

Background



Pennsylvania's 17 million acres of forests provide critical ecological, social, and economic services that sustain human and natural communities.

Pennsylvania's forests are a feature of virtually every community across the Commonwealth. They occupy 17 million of Pennsylvania's 28 million acres and are its predominant land cover. These forests offer countless ecological, social, and economic benefits to the public and play a vital role in shaping what many love best about their communities. An estimated 738,000 private forest landowners own approximately 70% of this forested acreage. These private forest landowners, their land, and the professionals who advise them are the distinctive focus of the Center for Private Forests at Penn State.

The work of the Center also has national relevance. Within the contiguous United States, approximately 58% of forest land—443 million acres—is in private ownership. Pennsylvania is third among the states in number of forest landowners. Pennsylvania landowners comprise 5% of landowners nationwide.¹

Importance of Forests to Pennsylvania

Pennsylvania's forests, whether privately or publicly owned, provide critical ecological, social, and economic services that sustain human and natural communities.

Ecologically, forests are a critical component of the green or natural infrastructure that provides clean air and water, and supports rich and diverse fungal, plant, and wildlife communities that are important to our very survival. Ecologically, forest health underpins the social and economic values our forests provide to the public and to communities.

Socially, forests are integral to the quality and character of community life. In surveys conducted among Pennsylvania residents, 88% of respondents considered outdoor recreation as an essential part of their lives.² Forests and other green spaces provide convenient and affordable opportunities to exercise, socialize, enjoy beautiful and majestic scenery, and observe wildlife. This exposure to natural settings has been found to have numerous health and wellness benefits as well.

Economically, the Commonwealth is the nation's number one producer of hardwood lumber, accounting for 10% of total US hardwood lumber output. Forests are the foundation of both the forest products industry, which contributes over \$21.5 billion annually in direct economic impact to the state's economy,³ and the PA outdoor recreation industry, which accounts for \$29.1 billion annually in consumer spending.⁴ Sustainable forest management enables forests to supply the raw materials needed for industries to thrive while regenerating for the future.

¹ Butler BJ et al. USDA Forest Service. *National Woodland Owner Survey*, US Forest Service Resource Bulletin NRS-99, March, 2016.

² Pennsylvania Department of Conservation and Natural Resources. *Pennsylvania Statewide Comprehensive Outdoor Recreation Plan: Public Survey Final Report, 2020-2024*.

³ Pennsylvania Department of Agriculture. Hardwoods Development Council. *Forests Products Industry in Pennsylvania, 2020*.

⁴ Pennsylvania Department of Conservation and Natural Resources. *Pennsylvania Statewide Comprehensive Outdoor Recreation Plan, 2020-2024*.

Importance of Privately-Owned Forests to Pennsylvania's Forested Landscape

Private forest landowners will largely determine the future of much of Pennsylvania's forested acreage.

Of the 17 million forested acres in Pennsylvania, the overwhelming majority—12 million acres—are privately owned, primarily by individuals and families.⁵ By comparison, the state forest system encompasses 2.2 million acres and game lands comprise 1.4 million acres.⁶

The actions taken by these owners have effects well beyond their individual properties, impacting the many ecological, social, and economic benefits forested landscapes provide. Understanding the perspectives and practices of these landowners is both vital and challenging, as they are changing as generational land transfers occur.

The Center recognizes that stewardship most often takes place when individuals forge strong connections to their land and to each other. The Center applies its expertise to foster the relationships and skills needed for landowners and professionals to collaborate effectively in caring for Pennsylvania's privately-owned forests.

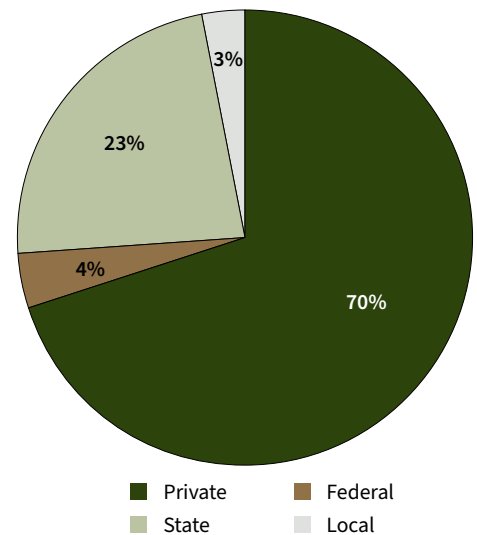
Threats to the Health and Vitality of Pennsylvania's Forested Landscape

While it is easy to understand that forest health and vitality is important, it is also possible to miss the intricacies of how our uses and decisions impact working forests. Our forests may appear healthy and thriving to many people, yet they are under significant and increasing threat from a variety of environmental, economic, and social forces.

- Ecosystem disturbances are accelerating, biodiversity is deteriorating, and invasive plants, pests, and diseases are proliferating due to the effects of global trade and climate change.
- Landowners, consciously or unconsciously, may make decisions harmful to their land for any number of reasons.
- Public policies generally do not adequately account for the tremendous value forests bring to the ecosystem and the fabric of community life.
- Land use planning decisions may cause increased fragmentation and intrusion into the forested landscape.

Private forest ownership and transfer patterns are exacerbating the impact of these trends. The Center, with its deep expertise and distinctive focus on private forest landowners and their land, aims to raise awareness and understanding of these threats, highlight the importance and urgency of taking meaningful action to ensure forest sustainability, and expand the resources available to assist with forest stewardship.

Pennsylvania Forest Acreage by Ownership
17 million acres



Decisions by landowners and by planners can impair the health and resiliency of the forest for generations.

⁵ Butler BJ et al. USDA Forest Service. *National Woodland Owner Survey*, US Forest Service Resource Bulletin NRS-99, March, 2016.

⁶ Price W, Sprague E. Pinchot Institute for Conservation. *Pennsylvania's Forests: How They Are Changing and Why We Should Care*, January, 2012.

The Center and Its Purpose

The Center for Private Forests at Penn State was founded in 2011 by Dr. Jim Finley and Dr. Allyson Muth, Department of Ecosystem Science and Management, College of Agricultural Sciences.



The Center is at the forefront of studying private forest landowners and their land. Through basic and applied research, model program development, and the large peer volunteer effort of the Pennsylvania Forest Stewards volunteer program, the Center is exploring innovative ways to provide current and future landowners with the inspiration, skills, and advice needed for effective stewardship. The foundation of the Center's work is the founders' three decades of transdisciplinary research and experience in the human dimensions of natural resource management focused on private forest landowners and their land. The Center shares its work and insights broadly, contributing to progress in advancing private forest stewardship nationwide.



The Center draws upon decades of experience studying and working at the intersection of private forest landowners and their land.

The Center advances research on private forest landowners and their concerns, inspires and cultivates stewardship among landowners and professionals, and works to expand the network of professionals available to advise landowners. Drawing upon its transdisciplinary research and experience, the Center develops new and innovative approaches for engaging private forest landowners in stewardship. To work effectively at this interface of people and forests, the Center strives to be collaborative, inclusive, and responsive to the evolving demands of human and natural communities. This work at the intersection of people and forests creates a direct link between a robust body of knowledge and tangible stewardship outcomes.

The Center also serves as an objective, trusted source of information and advice to government agencies, academic institutions, and non-governmental organizations on private forest landowners and their land. The Center convenes and engages these stakeholders for collaborative work to advance forest health and vitality in the larger community.

The Center serves Penn State's Land Grant mission by contributing its expertise to the work of the College, the Department, and Forestry and Wildlife Extension to enhance research, programs, and education of practicing and future natural resources professionals and other stakeholders.

The innovative work that is the foundation of the Center would not be possible without the long-standing partnership with the Pennsylvania Department of Conservation and Natural Resources (PA DCNR) Bureau of Forestry and the US Forest Service.

The Center's work with private forests, their owners, and the professionals who advise them will continue to inform the development of new solutions to a range of natural resources challenges, from clean water to climate change to land conservation, sustaining the ecosystem on which we all depend.

Aims and Strategies

Context

Over the next five years, the Center aims to build on three decades of transdisciplinary research and experience in the human dimensions of natural resource management to ensure the health and vitality of forested landscapes. The Center will advance basic and applied research on private forest landowners and their concerns, inspire and cultivate stewardship, and work to engage and expand access to professionals able to advise landowners using the collaborative model championed by the Center.

Influencing forest health and vitality will require a concerted effort on the part of the Center to foster shared understanding among landowners and professionals of the many aspects of forest sustainability and how to impact them. In working to advance stewardship, the Center will draw upon the criteria and indicators for sustainability in use by the PA DCNR Bureau of Forestry. These seven criteria and 18 associated sustainability indicators measure long-term changes in the many ecological, social, and economic conditions impacting forests.⁷ The Center's specific focus will be the subset of sustainability indicators which are relevant to private forest ownership:

- Extent and Characteristics of Forest Land (Indicators 1, 2, 3, 7)
- Forests and Wildlife (Indicator 4)
- Forests and the Watershed (Indicator 9)
- Forested Land Use Policy, Investment, and Management Standards (Indicators 14, 17, 18)

The complete list of indicators is provided in Appendix A.

The private forest landowners in Pennsylvania who have responsibility for the health of their forested land numbered approximately 738,000 as of 2010. This population is growing and changing as land use changes and generational land transfers occur. The 2010 Private Forest Landowner study conducted by the Center's founders determined that the population of private forest owners is increasing at an average rate of about 10,000 owners per year.⁸ Expanding the size, reach, and influence of the professional community available to advise landowners on stewardship practices and values—e.g., wildlife, water, finances, estate planning, taxes—will enable more landowners to engage in the care of their land.



Over the next five years, the Center will work to advance research, inspire and cultivate stewardship, and expand the stewardship professional community.

⁷ PA Department of Conservation and Natural Resources. *PA Statewide Forest Resources Assessment*, June, 2010. Adapted for PA based on work of the Montreal Process Working Group, a coalition of 12 member countries assembled to establish consensus definition of forest sustainability. See: *Criteria and Indicators for the Conservation and Management of Temperate and Boreal Forests*. https://www.montrealprocess.org/The_Montreal_Process/Criteria_and_Indicators/index.shtml

⁸ Metcalf AL, Finley JC, Luloff AE, Muth AB. *Pennsylvania's Private Forests: 2010 Private Forest Landowner Survey Summary*, October, 2012.

Six Key Aims

Over the 2022–2026 planning period, the Center will pursue the following aims:

Create Scholarship.

Develop and share basic and applied research and experience to expand understanding of private forest landowners, their land, and the professionals who advise them.

Inspire Stewardship.

Inspire and cultivate a growing community of private forest landowners adopting stewardship values and practices on their land.

Strengthen Connections.

Foster a shared vision and understanding of stewardship among private forest landowners, professionals, and academic faculty necessary for effective collaboration on private forest stewardship.

Expand the Stewardship Community.

Broaden the range of stewardship professionals and organizations advising private forest landowners on the stewardship of their land.

Inform Policy.

Convey knowledge and insights to aid development and implementation of policies and practices that impact private forest landowners and their land.

Build Infrastructure.

Build the Center organization, partnering, and financial capacity to impact forest health and vitality.

The rationale for each of these aims and the strategies to be pursued are outlined on the following pages.

With these aims and accompanying strategies, the Center intends to increase the number of landowners who embrace stewardship, expand the categories of professionals to advise them, and foster strong connections between landowners and professionals. These professionals might include certified financial planners, estate planning attorneys, wildlife professionals, and others whose services landowners may require in preparing to put their values into practice on their land. The Center will apply its research-based insights to the development of a strong and vibrant stewardship community, bringing professionals and private forest landowners together to accelerate the adoption of forest stewardship values and practices. The Center's work at the intersection of people and forests will strengthen the links between its robust body of knowledge and tangible stewardship outcomes.

Create Scholarship.

Develop and share basic and applied research and experience to expand understanding of private forest landowners, their land, and the professionals who advise them.

Opportunity

Housed within the Department of Ecosystem Science and Management, College of Agricultural Sciences, the scholars and professionals of the Center have decades of experience in the human dimensions of natural resource management focused on private forest landowners and their land. The Center studies and interacts with landowners, understanding their relationship to their land and exploring how to inspire their stewardship. The Center also has strong and longstanding relationships with professionals who advise landowners on the management of their land.

Drawing on its relationships and understanding, the Center is well-positioned to create new and highly relevant research-based insights on landowners and the professionals who advise them. Creating this bridge between research and practice meaningfully informs and fosters enduring stewardship of private forests across the Commonwealth and beyond.

The Center can serve as a catalyst and collaborator across the College and the University for basic and applied research on sustainable forestry on private land, positioning the College to pursue large-scale, transdisciplinary research opportunities. With its transdisciplinary perspective, the Center also can engage in multi-university collaborations. With the majority of forest land (58%) nationwide in private ownership, the Center's research and experience can contribute significantly to understanding stewardship nationwide.

Key Strategies

- Conduct basic and applied research to aid understanding of private forest landowners, stewardship professionals, their relationships, and their stewardship of forested landscapes.
- Develop and test innovative program concepts to enhance the work of stewardship professionals imparting knowledge, skills, and support to private forest landowners.
- Identify and pursue large-scale transdisciplinary collaborative research opportunities to address major questions relating to private forest landowners and their land.
- Share research- and experience-based knowledge about private forest landowners, stewardship professionals, and their land, in ways that influence the field nationally, regionally, and within Pennsylvania.



Conducting basic and applied research is key to understanding private forest landowners, stewardship professionals, their relationships, and their stewardship of forested landscapes.

Inspire Stewardship.

Inspire and cultivate a growing community of private forest landowners adopting stewardship values and practices on their land.

Opportunity

The Pennsylvania Forest Stewards volunteer program, a 30-year-old initiative, is now housed within the Center. These decades of experience with the program provide unique insight into how landowners engage in stewardship and the paths they choose to practice their values. The Center also has taken part in research designed to identify characteristics of landowners ready to implement stewardship practices on their land.

The Center will seek to draw on this expertise to optimize the work of the Pennsylvania Forest Steward volunteers and to pursue innovative ways of identifying and inspiring stewardship among landowners.

The Center will employ its research-based knowledge and its expertise in cultivating stewardship values and practices to maintain a vibrant volunteer network and attract landowners ready to pursue stewardship.



Maintaining a strong and vibrant network of Pennsylvania Forest Steward volunteers is key to engaging other landowners in stewardship through peer-to-peer learning.

Key Strategies

- Maintain a strong and vibrant network of Pennsylvania Forest Steward volunteers who practice stewardship on their own land, engage as peer resources for other landowners, and advise the Center on landowner experiences.
- Develop methods for identifying, characterizing, and engaging landowners ready to embrace forest stewardship. With Forestry and Wildlife Extension and other organizations, design, offer, and evaluate programs to meet the needs of these landowners.
- Develop and share innovative methods for characterizing landowner audiences and applying insights from this work to enhance the impact of programming.

Strengthen Connections.

Foster a shared vision and understanding of stewardship among private forest landowners, professionals, and academic faculty necessary for effective collaboration on private forest stewardship.

Opportunity

Studying and working at the intersection of people and forests provides the Center with a unique lens through which to view private forest landowners, their land, and their interactions with the professionals who assist them. Professionals and academic faculty members who collaborate with the Center, in turn, have their own perspectives on landowners, the professional-landowner relationship, and the practice of stewardship and how to inspire it on private land.

The Center has the opportunity to cultivate a shared vision and understanding of stewardship among landowners, professionals, and academic faculty, fostering connections necessary for effective collaboration. In doing so, the Center will benefit from the ongoing work by one of its graduate students, which is bringing new insights to the questions of how professionals and peers can establish trusting, effective relationships with landowners.

The Center can also provide additional opportunities for future stewardship professionals to gain meaningful experiences in collaborating with landowners, professionals, and organizations to advance forest health and vitality.

Key Strategies

- Pursue exchange of knowledge with stewardship professionals and academic faculty to deepen understanding of private forest landowners, their experiences in caring for their land, and ways of building connections and trust to foster stewardship.
- Identify tools and approaches to aid stewardship professionals in collaborating with landowners on the care of their forests.
- Provide opportunities for students to learn the skills needed to work effectively with landowners.



The Center collaborates with stewardship professionals and academic faculty in understanding private forest landowners and their experiences in caring for their land.

Expand the Stewardship Community.

Broaden the range of stewardship professionals and organizations advising private forest landowners on the stewardship of their land.

Opportunity

To manage their land sustainably, cost-effectively, and in accordance with their values, private forest landowners benefit from professional guidance in a variety of disciplines.

- Both general and forestry-specific financial and accounting advice may be needed to manage the significant expense associated with land purchase and management.
- The advice from a range of natural resources professionals supports the care of a property's forest, soil, water, and wildlife resources in accordance with sound principles of sustainability and the landowner's interests and values.
- The advice of foresters is vital for sustainable forest management and harvesting decisions.
- Financial planners and estate planning attorneys provide essential guidance in preparing for future transfers of property ownership and ensuring continuity of stewardship values into the next generation.



A key strategy to expand the stewardship community focuses on broadening the types of professionals and expertise available to private forest landowners.

While it may not be affordable or necessary for all landowners to have access to all these services, broadening the community of professionals available to advise landowners will increase access to needed expertise. Working with Forestry and Wildlife Extension, the Center has the opportunity to develop programs for these new audiences of professionals interested in serving private forest landowners.

Key Strategies

- Broaden the types of professionals and expertise available to private forest landowners, e.g., certified financial planners, estate planning attorneys, wildlife professionals, and conservation professionals. Foster strong connections among these audiences.
- With Forestry and Wildlife Extension and other organizations, design, offer, and evaluate programs for new categories of professionals interested in advising landowners on forest stewardship.
- Champion development of skills and expertise in adaptive management of working forests among landowners and conservation professionals.
- Foster diversity, equity, and inclusion initiatives within the Center, the Department of Ecosystem Science and Management, the College of Agricultural Sciences, and the stewardship community.

Inform Policy.

Convey knowledge and insights to aid development and implementation of policies and practices that impact private forest landowners and their land.

Opportunity

Regulatory, funding, planning, and taxation agencies and forest industry all have significant potential to influence private forest stewardship. The Center, which is recognized within Pennsylvania, regionally, nationally, and internationally for its research, program development, and innovation, is an objective source of information and insight for policy makers considering decisions that impact private forest landowners and their land. The Center brings its own and the College's expertise to the work of government agencies, academic institutions, and non-governmental organizations nationwide that are interested in forested landscapes.

With the benefit of the Center's insights, policy-making agencies and other organizations can develop programs which encourage landowners to retain their forests as forests and to manage them sustainably. Municipalities can be encouraged to engage in thoughtful land use planning which considers the many ecological, economic, and social benefits forests bring to communities.

Key Strategies

- Provide policy makers, elected officials, and other professionals with research-based insights into private forest landowners, their experiences in caring for their land, and the importance of private forests to communities and society.
- Convene stakeholders to address opportunities and challenges at the landowner-stewardship professional interface.
- Collaborate with representatives of government agencies, forest industry, non-governmental organizations, and educational institutions on topics important to forest stewardship.
- Lend expertise to policy makers developing incentive or compensation programs for private forest landowners for ecosystem services.



The Center serves as a trusted source of objective, research-based insight to inform policy related to private forest landowners and their land.

Build Infrastructure.

Build the Center organization, partnering, and financial capacity to impact forest health and vitality.

Opportunity

The Center functions with a small staff of professionals, administrators, and graduate students. With modest incremental funding, the Center can augment its staffing and strengthen its ability to conduct research, design programs, and generally share its expertise with a variety of partners within and outside of the University.

The Center has had success in advising multiple graduate students and can demonstrate the educational and scholarly value of this work. For the future, the Center seeks to maintain a graduate education effort. With additional resources, the Center also hopes to add opportunities for undergraduate students to gain experience working with private forest landowners and/or natural resources organizations.

The Center has a large, competent, and devoted group of volunteers who serve the organization in various roles: Center Council; Center Working Groups on forest economics, legacy, practices, and values; Pennsylvania Forest Stewards Steering Committee; and Pennsylvania Forest Steward volunteers. The Center can draw on, and direct, these volunteers to implement some of the Center's key initiatives.

The Center participates in a strong, longstanding network of governmental, industry, academic, natural resources, and other professional organizations with shared interests. The Center can multiply its impact through partnerships, in which the Center can contribute its research-based insight to inform program development for large-scale implementation by partners.

With respect to funding, the Center maintains an endowment principal account valued at approximately \$550,000 as of June 30, 2020, which generates \$17,000 in annual income. The Center currently has three grant funding sources. The Center's longstanding partnerships with the PA DCNR Bureau of Forestry and the US Forest Service continue to be vital to the Center's advancement of scholarship and practice. Building the endowment and obtaining additional grant funding sources would provide the Center with opportunities to expand the scope of its work.

Key Strategies

Staffing and Volunteer Development

- Maintain graduate student program to advance Center research.
- Expand professional and administrative structure to increase the Center's capacity to share its research and insights with partners and to collaborate on model program development.
- Update Center volunteer infrastructure, including Center Council, Council committees, Pennsylvania Forest Stewards Steering Committee, and Pennsylvania Forest Steward volunteers, to optimize contributions to aims of the strategic plan.



Graduate students bring important new insights to the Center's work in understanding private forest landowners and their values and practices.

- Maintain Center Working Groups to cultivate collaboration among landowners and professionals, building shared understanding of private forest landowners and their relationships to their land.

Partnering

- Cultivate partnerships with organizations having the mission, capacity, skills, and values to collaborate effectively in areas relevant to private forest landowners and their land.

Funding and Philanthropy

- Increase the endowment to generate annual income sufficient to support Center professional, graduate student, and administrative staff.
- Identify and apply for multiple new grant funding sources to broaden sources of support.

Center Organization

The Center infrastructure consists of professional and administrative staff, graduate students, and the several hundred volunteers in the Pennsylvania Forest Stewards volunteer program. The work of the Center is guided by the volunteer Center Council and the Pennsylvania Forest Stewards Steering Committee. Faculty members from across the College of Agricultural Sciences serve as affiliates to the Center, as do faculty from other institutions across the country.

Leadership

Allyson Brownlee Muth, Ed.D., Center Director. Dr. Muth, a founder of the Center, currently serves on the faculty as Assistant Research Professor of Private Forests Management in the Department of Ecosystem Science and Management in the College of Agricultural Sciences. Dr. Muth has experience in forest industry and private consulting and has strong interest in peer learning and creating dialogue to advance understanding of forest stewardship. Dr. Muth earned her B.S. degree in Natural Resources at the University of the South, Sewanee, TN; a Master’s degree in Forestry at the Yale School of Forestry and Environmental Studies, New Haven, CT; and an Ed.D. degree in Educational Psychology at the University of Tennessee, Knoxville, TN. She joined Penn State as a Forest Steward Program Associate in 2004.



Allyson Muth

James C. Finley, Ph.D., Council Chair. Dr. Finley, a founder of the Center, is currently Professor Emeritus of Forest Resources. He began his career with Penn State as an area Extension educator and served on the School of Forest Resources faculty (now Department of Ecosystem Science and Management) from 1981 to 2017. He earned his B.S. degree in Forest Science, his Master’s degree in Forest Resources, and his Ph.D. in Extension Education at Penn State. During his tenure, Dr. Finley’s primary research efforts included oak regeneration, human dimensions of natural resources, and sustainable forestry. He served as co-chair of the Human Dimensions of Natural Resources and the Environment dual title, intercollege degree program (2011-2017). He established and directed the Pennsylvania Forest Stewards volunteer program and is a private forest landowner himself.



Jim Finley



Blaine Aikin

Blaine F. Aikin, AIFA®, CFA, CFP®, Founder and Principal, Fiduciary Insights, LLC, Council Chair Elect. Blaine Aikin is the founder and principal of Fiduciary Insights, an independent provider of fiduciary subject matter expertise. He works with financial advisors to assure good stewardship of clients' assets. Prior to founding Fiduciary Insights in 2019, Blaine served as CEO and Executive Chairman of Fi360, a company that promotes a culture of fiduciary responsibility in financial services. He also served as a Director of the Certified Financial Planner Board of Standards from 2013 through 2016, Chair of CFP Board in 2017, and currently serves as a member of the Professional Standards Committee of the international Financial Planning Standards Board (FPSB). Blaine is an avid outdoorsman, cares for 200 acres of forest he owns in Venango County, and passionately seeks to promote good stewardship of forest resources through the Center. He is Chair Elect of the Center Council and is a Pennsylvania Forest Steward.

Staff

The Center professional and administrative staff currently consists of a project coordinator responsible for administration of the Pennsylvania Forest Stewards volunteer program and associated stewardship activities and a half-time administrative support assistant.

Graduate Students

The Center maintains a small number of graduate student positions for students serving under the mentorship of the Center Director.

Councils and Committees

The Center ensures that its work is informed by a variety of stakeholders in Pennsylvania and beyond who recognize the importance of private forests and their owners to forested landscapes. The Center has two volunteer committees in place to advise the Center, the Center Council and the Pennsylvania Forest Stewards Steering Committee. These committees are comprised of stakeholders from the private forest landowner community, Penn State University, and other groups and organizations interested in the health and vitality of private forests and the maintenance of a peer learning network to assist landowners.

Center Council. The Center Council, with 19 members, brings expertise in natural resources and various technical disciplines and embodies a variety of stakeholder groups and organizations. Council members include representatives from the private forest landowner community, Penn State University, and other groups and organizations having interest or expertise relevant to the Center's mission. The Council maintains an Executive Committee and a Nominating Committee.

Pennsylvania Forest Stewards Steering Committee. The Steering Committee for the Pennsylvania Forest Stewards volunteer program includes over 30 Pennsylvania Forest Steward volunteers and natural resources professionals from across the state, the region, and beyond. Representatives from the Center, the PA Bureau of Forestry, the PA Forestry Association, and the PA Sustainable Forestry Initiative SIC also serve as

advisors to the Committee.

Volunteers

Pennsylvania Forest Steward Volunteers. Founded in 1991, the Pennsylvania Forest Stewards volunteer program has trained over 700 landowners and conservation professionals as volunteers, with over 500 currently active in peer landowner education and other stewardship activities.

Center Working Groups. The Center has four working groups (Forest Economics, Forest Legacy, Forest Practices, and Forest Values) which contain a mix of private forest landowners and stewardship professionals collaborating to explore important topics in forest stewardship. These groups serve as resources for professionals and organizations wanting to understand issues impacting private forest ownership and management, and, ultimately, the health of private forest land itself.

Faculty Affiliates

Faculty members from across the College of Agricultural Sciences as well as faculty members from other institutions across the country serve as affiliates to the Center.

Resources

The work of the Center is supported by the College of Agricultural Sciences, grants from federal and state government agencies, grants from private charitable organizations, and philanthropic donations. The PA DCNR Bureau of Forestry and the US Forest Service are important and longstanding partners of the Center.

Over the plan period, the Center aims to increase its endowment principal account from its current value of \$550,000 (as of June 30, 2020) to \$10 million. This larger endowment will fund the staffing and infrastructure necessary for the Center to achieve its aims. The Center also hopes to pursue additional grant funding sources to support its research and program initiatives.



Over 500 trained Pennsylvania Forest Stewards share their knowledge with fellow forest landowners and serve in stewardship-related roles in their communities across the state.



With its research-based knowledge, experience, and relationships within the natural resources field and beyond, the Center will be an important force in driving broad adoption of stewardship values and practices.

Key Outcomes

The major outcomes to be sought under this plan are as follows:

- Remain at the forefront in advancing research-based insights about private forest landowners, their land, and the professionals who advise them.
- Collaborate broadly across the College, University, and stakeholder communities on basic and applied research opportunities, innovative educational approaches, and policies and programs.
- Enhance understanding of how to motivate and inspire action among private forest landowners interested in stewardship.
- Develop new insights and approaches for strengthening relationships between private forest landowners and stewardship professionals who advise them.
- Strengthen, increase, and broaden a network of professionals available to collaborate with, and advise, private forest landowners on stewardship.
- Build and optimize Center infrastructure, particularly the volunteer infrastructure, consistent with aims of strategic plan.

In seeking these outcomes, the Center envisions a future in which a large and growing network of professionals and landowners work together successfully, both one-on-one and through organizations, in advancing forest stewardship.

With its research-based knowledge, experience, and relationships within the natural resources field and beyond, the Center will be an important force in driving broad adoption of stewardship values and practices.

APPENDIX A

PA Bureau of Forestry Sustainability Indicators

(Areas of Center focus are highlighted in red)

Criterion/ Indicator	Description
Criterion 1.	Conservation of Biological Diversity
1	Area of total land, forest land, protected forest land, and forest ownership.
2	Forest type, size class, age class, and successional stage.
3	Extent of forest land conversion, fragmentation, and parcelization.
4	Status of forest/woodland communities and associated species of concern.
Criterion 2.	Maintenance of Productive Capacity of Forest Ecosystems
5	Area of timberland.
6	Annual removal of merchantable wood volume compared with net growth.
Criterion 3.	Maintenance of Forest Ecosystem Health and Vitality
7	Area and percent of forest land affected by biotic and abiotic processes and agents.
Criterion 4.	Conservation and Maintenance of Soil and Water Resources
8	Soil quality on forest land.
9	Area of forest land adjacent to surface water, and forest land by watershed.
10	Water quality in forested areas.
Criterion 5.	Maintenance of Forest Contribution to Global Carbon Cycles
11	Forest ecosystem biomass and forest carbon pools.
Criterion 6.	Maintenance and Enhancement of Long-Term Multiple Socioeconomic Benefits to Meet the Needs of Societies
12	Wood and wood products production, consumption, and trade.
13	Outdoor recreational participation and facilities.
14	Investments in forest health, management, research, and wood processing.
15	Forest certification.
16	Employment and wages in forest-related sectors.
Criterion 7.	Legal, Institutional, and Economic Framework for Forest Conservation and Sustainable Management
17	Forest management standards/guidelines. • Includes private forest landowner management guidelines, planning and assessments.
18	Forest-related planning, assessment, policy, and law. • Includes policy and legal framework for forest conservation and sustainable management. • Includes programs such as biomass and carbon pool programs which compensate landowners for ecosystem services.

PA Department of Conservation and Natural Resources. *PA Statewide Forest Resources Assessment*, June, 2010. Adapted for PA based on work of the Montreal Process Working Group, a coalition of 12 member countries assembled to establish consensus definition of forest sustainability. See: *Criteria and Indicators for the Conservation and Management of Temperate and Boreal Forests*. https://www.montrealprocess.org/The_Montreal_Process/Criteria_and_Indicators/index.shtml

Photo credits:

Laura Kirt: pg i top, pg ii, pg 1 middle; Iakov Filimonov@123RF: pg 9.

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