

Process for Landowners - Traditional approach

Branching out - Surveys are landowners responsibility

Stage 1: Landowner makes initial contact [Flowchart 9Trees CIC - Funds - Planting 2024](#)

Ideally be responding to new customers within 48 hours. By email or telephone depending on their preference

- a) Provide more background to 9Trees if needed
- b) Request basic information ([Response to landowners](#))
- c) Send [Landowner Overview](#)
- d) [Partnership Agreement - Branching out 9Trees CIC - Licence V7](#)
- e) [Branching out 9Trees CIC - Licence V6B](#)
- f) [Branching out 9Trees Carbon Offsetting CIC - Licence V5B - Google Docs](#) 50x50
- g) Answer any queries ([FAQ template](#))

(Checkpoint - Need to create a checklist of what makes a site not suitable at this stage (e.g., if someone has 0.2 acres, or if the woodland already existed, or is windblown in which case it is the landowners responsibility to replant). If site is not suitable contact to tell why ([unsuitable site template](#)))

Stage 2: Landowner has sent information and we want to work with them

- a) Ensure all the questions and concerns are answered
- b) Ask if they have read the Landowner Overview
- c) Send meeting link [Check our availability & book a meeting with 9Trees CIC](#)
- d) Update the [Landowners spreadsheet](#)

Stage 3: First meeting with landowners ([First meeting with landowners](#))

Preparing for the meeting:

- a) Search for the grid reference using [Grid reference finder](#) if not provided by the landowner
- b) Look for the area on [My Maps](#) and create a new pointer
- c) Create the map, which should be labelled with the Landowner's name and his location
- d) Draw the site's boundaries
- e) Share the map with the landowner before the meeting?

During the meeting:

- a) Present yourself and ask if they agree with the meeting being recorded
- b) Ask how they found about 9Trees
- c) Ask if they have any questions regarding our previous communications

Mapping

- d) Share screen to show the map and make sure the location is exact
- e) Ask further questions about existing trees and what precisely the landowner wants to do

If the land already has trees:

- f) Ask about the stocking density and why they want more trees
- g) Explain that 9Trees usually does not plant on land that already has trees
- h) Suggest our hedge fund scheme?

If the land does not have trees (or has very few trees):

- i) Create new lines: area to be planted, site entrance, and other features
- j) More info - 50 yr agreement

After the meeting:

- a) Send a follow-up email with the licence agreement and the walkabout sheet
- b) Send [9Trees Carbon Offsetting CIC - Licence V5.pdf](#) OR [Branching out 9Trees Carbon Offsetting CIC - Licence V5B - Google Docs](#)

& Example [Woodland Walkabout Sheet](#)
- c) Landowner to agree licence in Principal so we can do stage 4

Stage 4: Desk-based survey (Check [9Trees Site Assessment Procedure_v1.1](#))

(If using an Ecological consultancy they must fill in our forms and create a summary)

(Protect Earth - Steve Wiltshire)

*** Enter findings in a **NEW** copy; [9Trees Site Assessment Report Template v1.0.docx - Google Docs](#)

- a) Identify designated sites of conservation interest within or close to the PPS using MAGIC Map
- b) Check satellite images
- c) Identify flood risk
- d) Identify records of protected species within or close to the PPS using free, publicly available resources

If no further information required

- e) Send survey to landowner

If further studies/infos required

- f) Ask landowner for additional information
- g) Contact NRW, the Environment Agency or any relevant bodies if needed
- h) Conduct an EIA if necessary (0.5 ha England ?? Wales)

MC or Jo to send Contract by DocuSign

Contract Signed to proceed to stage 5

- i) Now review your findings; [9Trees Site Assessment Implications v1.0.docx - Google Docs](#)

Stage 5: Site visit

If land is still suitable

- a) Request site visit ([site visit request template](#))
Then

- b) If interested in site visit ([arrange site visit template](#))
- c) No response ([reminder template](#)) **send reminder in 2 weeks**

If land not suitable for planting:

- a) Thank the person for their initial interest ([unsuitable site template](#))

Stage 6: Post Site Assessment <2 weeks after assessment

Formulate plan for site; how many trees can it support, which species would be suitable for the habitat?

- a) Site is not suitable; might be because of legal restrictions or habitat is already ecologically valuable ([unsuitable site template](#))
- b) Site is suitable, but there aren't enough/ the right trees; suggest potential future plan and explain why it will take time to implement. Then later send planting request when conditions are better. ([delayed planting template](#))([Planting request post delay template](#))
- c) Site is suitable and correct trees are available; suggest and explain the plan for planting ([Planting request template](#))

Stage 7: Legal stuff

Ash/Mike to complete - what important things do landowners need to be aware of and sign before planting?  [9Trees Carbon Offsetting CIC - Licence V5.pdf](#)

 [Branching out 9Trees Carbon Offsetting CIC - Licence V5B.pdf](#)

[Branching out 9Trees Carbon Offsetting CIC - Licence V5B - Google Docs](#)

SEND VIA DOCUSIGN

Use Vf above save as - Suz Crichton-Stuart etc

Fill in all the

Upload to Docusign

Ensure Signature and Date is to be filled in.

All info should be gathered from the Landowners Spreadsheet

(if not complete see previous emails and complete spreadsheet / Call Joel Thomas / look for the Planting Plan)

Stage 8: Planting

How does the planting process work?

Stage 9: Post Planting

- a) Post planting confirmation: how regular the maintenance checks will be, map of trees planted ([post planting template](#)) **Within 1 week of planting**

- b) Maintenance visits ([maintenance visit template](#)) This will probably depend on the age of the woodland and other factors. Will need to refer to the individual plan for each site.

STAGE 10

Ask Jo Bradley to create a Walkabout sheet

Stage 11

Peppercorn to be delivered by hand or in the post - As agreed in the terms of the lease