SOUTHERN PINE BEETLE PREVENTION AND
RESTORATION COST SHARE PROGRAM

Photo by Jessica Kaplan
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I. Introduction

The Southern Pine Beetle (SPB) (*Dendroctonus frontalis*) is the most destructive insect pest to southern yellow pines in the southeastern US. Shortleaf pine (*Pinus echinata*) and loblolly pine (*Pinus taeda*) are the most susceptible species. The most susceptible stands are usually over dense and composed of these species, separate or in mixture, stressed from the environment, competition, age, or a combination of two or more of these factors. During periodic outbreaks, SPB populations can rise, attack, and quickly kill multiple acres of trees within these stands. Because of increasing length and severity of SPB outbreaks, the USDA Forest Service and the Southern Group of State Foresters initiated a more proactive approach for mitigating the severity of outbreaks by creating the Southern Pine Beetle Prevention and Restoration Cost Share Program. This is a federally funded Cost Share Program that is implemented at the state level.

II. Objective

In 2006, the SCFC’s SPB Prevention and Restoration Cost Share Program (SPB Program) was created for non-industrial private forest (NIPF) landowners of South Carolina. The SPB Program seeks to mitigate future loss from SPB by managing pine density through Prevention and Restoration practices. These practices ensure that a pine stand will be of merchantable size before the stress of being overly dense develops. Receiving income and maintaining vigorous growth are usually enough incentives for landowners to thin merchantable sized pine stands and, in return, reduce the potential loss from SPB.

The SPB Program will allow NIPF landowners cost share for approved Prevention and Restoration practices. Prevention practices will include reducing the amount of stems within immature, over-stocked pine stands, and thinning by hand and/or machine are the approved treatments used during this practice. Restoration practices will include returning damaged or harvested areas back to healthy forests by planting loblolly or longleaf at lower densities, or hardwood planting.
III. Beneficial Effects from SPB Prevention and Restoration Practices

Prevention and Restoration practices will have many beneficial effects that reduce, postpone, or minimize the probability of SPB spot development (Risk) and spread (Hazard). Precommercially thinning overstocked stands during Prevention practices will reduce SPB Risk and Hazard, and planting loblolly or longleaf at lower densities during Restoration practices will postpone or minimize SPB Risk and Hazard. Hardwood planting during Restoration practices can provide buffer strips that further minimize SPB Risk and Hazard in adjacent pine stands.

A. Prevention Practices
   • Effects that Reduce SPB Risk:
     o Lower intraspecific competition among stems.
     o More water, nutrients and sunlight are available.
     o Increased stem health and vigor.
     o Improved resin production and internal stem pressure, which allows for better pitch tube formation, resulting in unsuccessful beetle attacks.
   • Effects that Reduce SPB Hazard:
     o Increased stem to stem travel distance.
     o Less concentration of SPB resources (stressed stems).

B. Restoration Practices
   • Effects that Minimize and Postpone SPB Risk:
     o Adjacent stands or buffer strips with species resistant to SPB attack.
     o Postponed intraspecific competition among stems.
     o Availability of water, nutrients and sunlight are prolonged.
     o Prolonged stem health and vigor.
     o Improved resin production and internal stem pressure, which allows for better pitch tube formation, resulting in unsuccessful beetle attacks.
   • Effects that Minimize and Postpone SPB Hazard:
     o Adjacent stands or buffer strips with species resistant to SPB attack.
     o Postponed concentration of SPB resources.
IV. Other Beneficial Effects from SPB Prevention and Restoration Practices

Besides reducing, postponing, or avoiding SPB Risk and SPB Hazard, SPB Prevention and Restoration practices will have an effect on aesthetics, wildlife and the economic value of timber.

A. Prevention Practices

1. Aesthetics: Nothing is more disruptive when viewing a pine stand than a large-gaping hole of dead trees from an SPB spot. This is usually a result of landowners deciding that thick, un-thinned pine stands are more attractive than thinned pine stands, but viewing an aesthetically sensitive portion of a pine stand with fewer trees is more attractive than viewing the same portion with no trees. Prevention practices will help minimize the threat of large-gaping holes in pine stands by providing fewer trees more resources and room to grow.

2. Wildlife: Precommercial thinning of an over-stocked pine stand will potentially allow more sunlight to reach the forest floor. This has a direct impact on wildlife- such as deer, turkey, and quail- by increasing the availability of forbs and herbs.

3. Economic value of timber: Radial growth is inversely correlated to the number of stems per acre. Precommercial thinning of an over-stocked pine stand will increase the rate of radial growth, decrease the amount of time to reach merchantable size, and lessen the probability of economic loss from SPB. A study conducted by the SCFC showed a 15.4% Internal Rate of Return (IRR) for an over-stocked pine stand precommercially thinned at age 9 with cost share assistance and a 9.0% IRR when no precommercial thin was conducted. For more information regarding this study, please follow the link: http://www.state.sc.us/forest/spbfinancial.pdf
B. **Restoration Practices**

1. **Aesthetics:** Planting SPB resistant species will avoid the threat of large-gaping holes, and planting susceptible species at a wider spacing will postpone the threat.

2. **Wildlife:** Wider spacing will postpone crown closure and prolong the availability of sunlight to forbs and herbs. Tree species selection can also affect wildlife by creating stands that are more easily managed for their existence; i.e., longleaf pine’s tolerance to fire makes it an ideal selection for quail management, and hardwood’s mast production makes it an ideal selection for deer and turkey management.

3. **Economic value of timber:** Because of slipping pine pulpwood prices, rising fuel costs, and the scale of economics for logging contractors, planting at a wider spacing may be advantageous for landowners with a small stands or stands at considerable distances from pulpwood processing facilities since a portion of the stands can be marketed as chip and saw during the first thinning. Chip and Saw is 2.5-3X more valuable than pulpwood. A study conducted by the SCFC showed a 16.2% IRR for a pine stand planted on a 10’ X 10’ spacing with cost share assistance and a 13.9% IRR without cost share assistance. *For more information regarding this study, please follow the link: [http://www.state.sc.us/forest/spbfinancial.pdf](http://www.state.sc.us/forest/spbfinancial.pdf)*

V. **Eligibility Requirements for SPB Program: Landownership and County**

Applicants should view eligibility requirements for landownership and county before other requirements when considering applying to the SPB Program. These requirements will be prioritized before others when determining eligibility. County eligibility mostly depends on the species being planted during Restoration practices.
A. **Landownership**

1. **Eligible:** non-industrial private forest landowners (no minimum or maximum acreage), including: private individuals, groups, partnerships, associations, individual trusts and corporations that are not engaged in processing forest products and without publicly traded stock.

2. **Ineligible:**
   
   A. Private entities engaged in the business of manufacturing forest products, including, but not limited to: sawmills, pulp mills, paper mills, plywood mills, and oleoresin plants. Real estate investment trusts or other publicly traded corporations are also ineligible.
   
   B. No government agency: federal, state, county, or municipality.

B. **County**

1. **Prevention Practices:** All counties eligible.

2. **Restoration Practices:** Restricted to stands presently or recently (<5 years) in pine management and within the natural range and soils of selected species. For longleaf, this will include counties with only eligible portions and counties entirely eligible. Soil map information, including natural tree species for specific soils, can be located at most county USDA Natural Resources Conservation Offices.

   A. **Loblolly:** All counties eligible (statewide range).

   B. **Hardwood:** All counties eligible (statewide range).

   C. **Longleaf:** Limited range in SC.

      1. **Counties ineligible:** Abbeville, Anderson, Cherokee, Chester, Greenville, Laurens, Oconee, Pickens, Spartanburg, Union, and York.

      2. **Counties with only eligible portions:** Chesterfield, Fairfield, Greenwood, Kershaw, Lancaster, McCormick, Newberry, Richland, and Saluda.

      3. **Counties entirely eligible:** all counties not previously mentioned.
VI. SPB Program Guidelines

If landownership and county eligibility requirements have been satisfied, then applicants should read the following SPB Program Guidelines to ensure their objectives will be satisfied. These are subject to change, but changes will only affect applications yet to be approved. Approved applications will be held to the guidelines in effect during their time of approval.

- **Maximum Annual Payment:** The maximum cost share reimbursement per application is $10,000 per federal fiscal year (October 1- September 30).

- **Minimum Treatment Acreage:** All cost share practices must be conducted on a minimum of 10 contiguous acres; however, this acreage may be owned by one or more persons.

- **Conservation Reserve Program (CRP) Pine Stands:** If all other requirements are met, CRP stands are eligible for precommercial thinning if “blow-in” occurred from adjacent pine stands and for low-density planting after being harvested.

- **Federal Funds from other Cost Share Programs:** Applicants already receiving funds from another federally funded cost share program for similar forestry practices on the same acreage will not be eligible for the SPB Program or any other cost share program and should not apply.

- **Applying to other Cost Share Programs:** Applicants are encouraged to apply to other cost share programs at the same time when applying to the SPB Program. However, applicants will only be allowed participation under one cost share program on the same acreage during the same fiscal year.

- **Application Period:** Landowners may apply to the program at any time of year, but only one application per landowner will be approved per federal fiscal year.
• **Compliance:** Applicants must wait until approval in writing before performing any forestry practices. Failure to do this will result in a denied application and loss of cost share reimbursement toward restoration and prevention forestry practices performed. During Restoration, all timber sales must be concluded and timber harvested prior to application. For all practices landowners are required to follow guidelines. Not doing so will result in negative consequences.

• **Time Constraint:** After being notified in writing of their approval, applicants will have 12 months to conduct their restoration or prevention practices. An extension of 8 months will be granted if applicants notify the program director in writing 30 days before the expiration date. Failure to do this will result in a cancelled application and a new application will have to be submitted.

• **Best Management Practice’s:** All prevention and restoration forestry practices must be implemented according to *South Carolina’s Best Management Practice’s*.

• **Evaluation:** An SCFC Project Forester will evaluate (at no cost) the stand to ensure all practices were performed according to the guidelines before cost share reimbursement will be granted to the applicant. If the stand fails evaluation, additional practices must be performed along with another evaluation; e.g., a restored pine stand planted at the correct density with volunteer pines mixed with planted would require eradication of volunteers before application approval. However, planting more stems than the guidelines state during Restoration will result in a cancelled application and a total loss of funds, and leaving too many stems during Prevention will result in a reduced cost share rate. Please refer to the **Approved Forestry Practices (VII)** section for more details.

• **Cost Share Reimbursement:** For passing evaluations, reimbursement for restoration practices will be set at approximately 50 percent of the statewide average for the specified practice, and reimbursement for prevention practices will be 60 percent of the applicants cost up to $90/acre, whichever is less.
- **Component Payment:** Cost share reimbursement can be divided into two payments when two or more practices are prescribed. Each payment will be based on the practice(s) performed and their passing evaluation.

- **Stand Maintenance Requirement:** All stands reimbursed by the program must be maintained for 10 years; i.e., stands may not be clear-cut or destroyed for 10 years after receiving cost share reimbursement. If the stands reimbursed by the program are sold, then all cost-share funds received by the SBP Program must be returned unless new owner agrees to maintain the practice for the balance of the contract. Failure to uphold this agreement by the responsible landowner will result in paying back all cost share funds received from the SPB Program.

**VII. Approved Forestry Practices and Eligible Stands for Cost Share Reimbursement**

If landownership and county eligibility requirements have been satisfied and SPB Program Guidelines do not conflict with landowner objectives, then eligible stands should be considered for cost share approval for approved forestry practices. This service can be done by an SCFC Project or SPB Forester at no cost to the applicant.

Precommercial thinning of pine stands during Prevention forestry practices, low density stand establishment of loblolly or longleaf, or hardwood planting during Restoration practices, and any necessary practice(s) specified by an SCFC Project or SPB Forester to conduct Prevention or Restoration practices will be eligible for cost share reimbursement. Please review the lists of stand requirements and treatment guidelines (before and after) for Prevention and Restoration practices to ensure your stand qualifies and that you do not suffer negative consequences from noncompliance.
A. Prevention Practices: Precommercial Thinning

1. Stand Requirements: Stands must consist of 70% pine, have >700 pine stems per acre, and have no “Seed Trees” present from the previous stand. A minimum and maximum age is not required, but most precommercial thinning is done after the dominant, weak, and diseased stems have developed, usually during years 5-9. A precommercial thinning correctly conducted during these years will retain a larger portion of the healthy and dominant stems while removing all of the weak and diseased. Landowners with overly dense pine stands >15 years old are encouraged to conduct a commercial thinning first (if applicable) and follow-up with a precommercial thinning of the residual strips if the stand still meets the requirements. The commercial thinning will not be cost shared.

2. Practice Guidelines: The required residual density from precommercial thinning will be (+/-10%) 545 stems per acre (8 X 10 spacing), which can be conducted by machine or hand, or a combination of both. It is recommended to conduct the precommercial thinning in early spring after the threat of ice storms have passed. Conducting during this time of year will allow the felled stems to dry before beetles become active and allow the residual stems to develop compression wood for the oncoming winter. Compression wood, a wood more resistant to wind and ice damage, is developed during the growing season in response to the stem swaying in the wind.

3. Cost Share Reimbursement: All practices specified by an SCFC Project Forester and performed by the applicant(s) are eligible for cost share reimbursement at the rate of 60% of costs up to $94 per acre, whichever is less. Completed stands not within compliance may result in additional stems being removed before receiving funds, or a reduced cost share rate if additional stems are not removed. The reduced cost share rate will be 40% of costs up to $62/acre, whichever is less. However, regardless of residual density, stems must be left onsite and the landowner has to have incurred an out-of-pocket expense in order for any cost to be shared.
B. Restoration Practices: Low-Density Stand Establishment:

1. **Stand Requirements:** Stands must currently or recently (< 5 years) be in pine management; e.g., a 5 year old, poor quality shortleaf/virginia pine stand or a stand of mixed susceptible pines and cull hardwoods can be cleared and regenerated at a lower density under this practice. In an effort to minimize “blow-in” of pine seed, seed trees must be felled or harvested for stand eligibility, and all timber sales must be concluded and timber harvested prior to application.

2. **Practice Guidelines:** Planting densities should be no more than (± 10%) 435 stems per acre (10 X 10 spacing) for loblolly, 545 (± 10%) stems per acre (10 X 8 spacing) for longleaf and no maximum for hardwoods. For all selected species, a minimum of 300 stems per acre must be present after the first growing season for cost-share reimbursement. During site prep practices, all volunteer pines must be eradicated prior to planting. Because of the potential of promoting volunteer pines, planting first and releasing with herbicides second will not be allowed.

3. **Cost-Share Reimbursement:** All practices specified by an SCFC Project Forester and performed by the applicant(s) are eligible for cost-share reimbursement at the rate of 50% of the statewide average cost. Completed stands not within compliance will result in a total loss of funds. **No Exceptions.**
VIII. Management Plans

Once eligibility and stand requirements have been satisfied, applicants will be required to have an SPB Management Plan written by an SCFC Project Forester or consulting forester. If written by an SCFC Project Forester, this will be completed at no cost to the applicant(s).

Applicants in possession of comprehensive forest management plans or Forest Stewardship Plans are not excluded from participation in the SPB Program, but applicants with these plans will also be required to obtain an SPB Management Plan.

SPB Management Plans must include:

- County of treated area.
- GPS point in close proximity of the center of treated area.
- Tract map showing boundaries of the property and treated area.
- Brief statement ensuring all practices are implemented according to SC’s BMP’s.
- Brief description of stand and specified practice(s).

- Variables pertinent to Prevention or Restoration practices:
  - **Prevention:**
    - Age (average age of pine stems)
    - Percent pine and species type.
    - Stems per acre (total and pine).
    - Total and pine basal area (if applicable).
    - Precommercial thinning Type: hand or machine.
  - **Restoration:**
    - Age (years since harvest).
    - Competing vegetation (trees, forbs and grasses).
    - Site Prep Treatment
    - Spacing and species to be planted.

- Future prescriptions based on SPB and Annosus Root Rot Risk Assessment.
IX. Application Procedure

1. After reviewing Ownership and County Eligibilities for SPB Restoration and Prevention Practices, the applicant(s) should contact an SCFC Project Forester and/or consulting forester for determining stand eligibility of the desired practice.

2. An assessment of the stand will be conducted, stressing the variables pertinent for performing the necessary SPB Forestry Practices. This assessment will be a portion of the SPB Management Plan.

3. If the SPB Management Plan was written by a consulting forester, an SCFC Project Forester should be contacted to review and approve the SPB Management Plan and the stand it is written for.

4. If the SCFC Project Forester declares that the SPB Management Plan and stand meet the requirements necessary for the desired SPB forestry practices, then an SPB Cost Share Application- including practices, acres, and applicant(s) signature(s)- should be submitted to the SCFC Forest Health Unit, along with the SPB Management Plan.

5. If applying for SPB Restoration practices, all timber sales must be concluded and timber harvested prior to application, and if applying for Prevention practices, seed trees must be harvested/felled prior to application.

6. SPB Cost Share Application approval will be on a “first come/ first serve” basis per county. After SPB Cost Share Applications are received, processing numbers will be given in sequential order and applications will then be placed on a waiting list for that county.
7. Applicants are encouraged to apply for other cost share programs at the same time when applying to the SPB Program. However, applicants will only be allowed participation under one cost share program on the same acreage during the same fiscal year.

8. Applicants already receiving funds from another federally funded cost share program for similar forestry practices on the same acreage will not be eligible for the SPB Cost Share Program or any other cost-share program and should not apply.

9. After an SPB Cost Share Application has been submitted, changes to the SPB Management Plan and/or Cost Share Application can be made. An amended SPB Management Plan and/or Cost Share Application must be submitted and the old application will be cancelled. The amended application will retain the same processing number as the original.

10. If changes to the SPB Cost Share Application and/or SPB Management Plan are made after application approval, then only the approved practices and acres under the original SPB Cost Share Application will be eligible for cost-share; i.e., the dollar value of an approved SPB Cost Share Application shall not increase.

11. Applicants must wait until being notified in writing of their approval before conducting any forestry practices under this program. Failure to do this will result in a denied application and no cost share reimbursement.

12. After approval from the SPB Program, applicants will be notified in writing and will have 12 months to complete the treatments necessary for the SPB forestry practice. To request an extension of 8 months, the applicant must notify the SPB Program coordinator in writing 30 days prior to expiration. If practices cannot be completed during the 8 month extension, then the application will be
13. An SCFC Project Forester or Technician will evaluate the treated area to ensure all practices were performed according to the guidelines before cost share reimbursement will be granted to the applicant. A failing evaluation will result in negative consequences for the applicant. Please refer to the Approved Forestry Practices (VII) section for more details.

14. Once a passing evaluation is submitted to the SCFC Forest Health Office, the process of cost share reimbursement will commence.

15. At the applicant’s request, cost share reimbursement can be divided into two payments when two or more practices are prescribed, or if a portion of the stand has been treated. Each payment will be based on the acres where the practice(s) are performed and their passing evaluation.
Appendix A: Important Terms of SPB Prevention and Restoration

- **SPB Hazard:** Probability for SPB spot spread. SPB hazard is positively correlated to the amount of stems and basal area per acre, but is inversely correlated to the average distance between; i.e., with increasing stems and basal area per acre, the average distance between will decrease and SPB hazard will increase.

- **SPB Risk:** Probability of SPB spot development. Contributing factors to SPB risk are age, biotic (species composition and stem health and vigor) and abiotic (slope, percent clay content, and landform). Risk is thought to increase with stand age, susceptible species, and increasing slope and clay content within the Piedmont, and with stand age, susceptible species, and landform (wet lowland or dry ridge) within the Coastal Plain.

- **Precommercial Thinning:** Thinning a stand before stems have reached commercial size. Stems felled are left onsite and the landowner has incurred an out-of-pocket expense. This will have a direct affect on SPB hazard by decreasing the amount stems and basal area per acre and increasing the average distance among stems; i.e., intraspecific competition will be reduced and health and vigor will be increased.

- **Restoration:** The practice of restoring recently SPB damaged or harvested areas by planting less susceptible species at lower densities (wider spacing). SPB risk will be lowered by planting less susceptible species and SPB hazard will be postponed by planting at lower densities; i.e., intraspecific competition will be postponed and health and vigor among residual stems will be prolonged.

- **Forestry (Silviculture) Practice:** Applied ecology to a stand of trees, tempered by environmental, economic and social influences; e.g., pre-commercial thinning, competition reduction, clear-cutting, replanting, etc.

- **Forestry Treatment:** Specific task used to accomplish the same or different forestry practice; e.g., pre-commercially thinning by hand versus pre-commercially by machine, competition reduction with herbicides versus competition reduction with prescribed fire, etc.
# Appendix B: SCFC Project and SPB Foresters

<table>
<thead>
<tr>
<th>County</th>
<th>Forester</th>
<th>Phone</th>
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<td>Kershaw</td>
<td>Justin Smith</td>
<td>(803)494-8488</td>
<td>5500 Wedgefield Hwy, Wedgefield, SC 29168</td>
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<tr>
<td>Lancaster</td>
<td>Justin Smith</td>
<td>(843)498-6918</td>
<td>16222 Hwy. 1, Patrick, SC 29584</td>
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<tr>
<td>Laurens</td>
<td>Michael Mcûû</td>
<td>(864)225-9701</td>
<td>P.O. Box 1041, Anderson, SC 29622</td>
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<tr>
<td>Lee</td>
<td>Ryan Bean</td>
<td>(803)494-8488</td>
<td>5500 Wedgefield Highway, Wedgefield, SC 29168</td>
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<tr>
<td>Lexington</td>
<td>Jeff Riggin</td>
<td>(803)276-0205</td>
<td>39 General Henderson Rd., Newberry, SC 29108</td>
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<tr>
<td>McCormick</td>
<td>Stephen Patterson</td>
<td>(864)445-7031</td>
<td>122 Fire Tower Rd., Saluda, SC 29138</td>
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<tr>
<td>County</td>
<td>Forester</td>
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<tr>
<td>Marion</td>
<td>Eric West</td>
<td>(843)423-3722</td>
<td>136 Airport Court, Mullins, SC 29574</td>
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<tr>
<td>Marlboro</td>
<td>James Brunson</td>
<td>(843)498-6918</td>
<td>16222 Hwy. 1, Patrick, SC 29584</td>
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<tr>
<td>Newberry</td>
<td>Chase Folk</td>
<td>(803)276-0205</td>
<td>39 General Henderson Rd., Newberry, SC 29108</td>
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<tr>
<td>Oconee</td>
<td>Trey Cox</td>
<td>(864)878-6134</td>
<td>PO Box 391, Pickens, SC 29671</td>
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<tr>
<td>Orangeburg</td>
<td>Stephen Crown</td>
<td>(803)534-3543</td>
<td>353 Fire Tower Road, Orangeburg, SC 29118</td>
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<td>Pickens</td>
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<td>Richland</td>
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<td>Stephen Patterson</td>
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<td>122 Fire Tower Rd., Saluda, SC 29138</td>
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<tr>
<td>Spartanburg</td>
<td>Jon Barker</td>
<td>(864)583-3438</td>
<td>725 Hwy. 56 S., Spartanburg, SC 29302</td>
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<tr>
<td>Sumter</td>
<td>Ryan Bean</td>
<td>(803)494-8488</td>
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<td>Union</td>
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<tr>
<td>Williamsburg</td>
<td>Chet Foyle</td>
<td>(843)382-8761</td>
<td>596 I.M. Graham Road, Kingstree, SC 29556</td>
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<tr>
<td>York</td>
<td>Roy Boyd</td>
<td>(803)684-4311</td>
<td>2790 Fire Tower Rd., Rock Hill, SC 29730</td>
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</table>

**Southern Pine Beetle Foresters**

<table>
<thead>
<tr>
<th>County</th>
<th>Forester</th>
<th>Phone</th>
<th>Business Address</th>
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<tbody>
<tr>
<td>Coastal East</td>
<td>Molly Sanford</td>
<td>(843)571-0136</td>
<td>1820 Savannah Hwy- Suite A-2, Charleston, SC 29407</td>
</tr>
<tr>
<td>Coastal West</td>
<td>Vacant</td>
<td>(803)943-3915</td>
<td>PO Box 486, Hampton, SC 29924</td>
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<tr>
<td>Pee Dee East</td>
<td>Eric West</td>
<td>(843)423-7900</td>
<td>136 Airport Court, Mullins, SC 29574</td>
</tr>
<tr>
<td>Pee Dee West</td>
<td>Justin Smith</td>
<td>(803)494-8488</td>
<td>1622 Hwy # 1, Patrick, SC 29584</td>
</tr>
<tr>
<td>Piedmont East</td>
<td>Jeff Riggin</td>
<td>(803)276-0205</td>
<td>39 General Henderson Rd., Newberry, SC 29108</td>
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<tr>
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<td>Stephen Patterson</td>
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Rev, 7/22/10