The Joint Management Plan Template...

Rick Fletcher
Eaglesview Forestry
May 2013
Management Plans

* Approximately ____% of woodland owners in the USA have written plans...

* For those in Oregon with a written plan:
  * 41% received greater income due to the plan
  * 84% felt it “increased awareness of management options”
  * 86% said the plan helped them “make more informed management decisions”
Key Question:
How Do Plans Help Forest Owners?

- Encouraging them to be active managers of their land.
- Create a record for current and future generations owning the land.
- Meet requirements for tax deferral, and/or building a home.
- Qualifying for incentive programs.
- Meeting requirements of certification.
Completed plans are much more important to professionals and programs than they are to landowners.

Management planning is a journey not a destination.

There is no one right path for all owners.

Goal is not just completed plans, but better land stewardship.
## Forest Mgt Plans in Oregon, circa 2003

<table>
<thead>
<tr>
<th>Plan Type</th>
<th>Making better decisions</th>
<th>Meeting regulations</th>
<th>Certification</th>
<th>Cost-Share</th>
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</table>

X= NEW ELEMENT FOR 2010

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Why a “Joint Template?”

- Simplify process for landowners.
- Save time and money for landowners in meeting program requirements for cost-share and certification.
- Consolidation planning process and terminology nationally, better for forestry professionals.
Managing Your Woodlands Joint Template meets the requirements for:

1. Plans written under the USDA-National Forest Stewardship Program
2. Certification through the American Tree Farm System
3. Forestry Financial Assistance administered by the Natural Resources Conservation Service (NRCS).

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For Program Information

1. Forest Stewardship-
   http://www.fs.fed.us/spf/coop/programs/loa/fsp.shtml

2. American Tree Farm System-
   www.treefarmsystem.org/stateleaders

Template and Guide Materials

* Managing Your Woodlands: A template for your plans for the future (Fillable Word Document)
* Template Guide for Landowners (PDF)
* Template Guide for NR Professionals (PDF)

Management Plan Template

Thank you for your interest in the Managing Your Woods: A Template for Your Plans for the Future that was developed by ATFS, the Natural Resources Conservation Service (NRCS) and the U.S. Forest Service, with input from state foresters and other partners.

The goal of this joint management plan template is to allow landowners to use one management plan to participate in the American Tree Farm System, the Forest Stewardship Program, and the NRCS incentive programs.

This national template has been developed in accordance with all the national program requirements for the three programs listed above. The template is not a program requirement for any of the three programs rather it is a tool for landowners and foresters.

This national template is based on the Montana Forest Stewardship and Tree Farm management plan developed by Forestry Professor Dr. Peter Kolb of Montana State University [http://www.montanaextension.org/forestry]. His intent was to provide an easy to use, practical, and ecologically based guide for forest landowners: 1) who wished to assess their forests for its unique qualities and value, 2) that wanted to develop an action plan that conserves the functionality and productivity of their forest, 3) that desire an efficient and independent forest plan that combines the benefits of state, national and international certification and costshare programs. The final template further incorporated components from similar forest landowner programs developed in Missouri, Mississippi and Oregon. After developing the first draft of this template, the template was sent to ATFS, state forester and NRCS networks for feedback and comments.

This template and its associated landowner and forester guides is the result of their feedback: state Tree Farm programs, state foresters and NRCS can join together to review the template to see if it would be a useful tool for landowners in their state. If so, then the template can be adapted for your state's use. As long as all the components of the national template are present and addressed in the state modified template, there is no need for national level approval.

States are also encouraged to add their own state-specific requirements, programs and resources available for landowners and foresters.

To implement the template and allow easy access for landowners; the state Tree Farm program, state forester and state conservationist will have to develop a process for landowners to apply for the programs. Some ideas that other states have developed include:

- A panel that reviews/approves plans for all three programs in that state. The panel is made up of representatives from each program.
- One person identified by the state who can approve plans for all three programs. The program signature page will need to include a description of the process for landowners and the appropriate signatures necessary for a landowner to participate.

Guide for Foresters for the Joint Management Plan Template

Guide for Landowners for the Joint Management Plan Template

Managing Your Woodlands: National ATFS, FS, NRCS Joint Management Plan Template

Create Your MyLandPlan.org Account to Map Your Forest and Set Goals for Your Land.
Template Topics

- Owner/Author Information
- Property Description
- Property History
- Forest Management Goals
- Property Map(s)
- Forest Natural Resources Enhancement and Protection
  - Protect Special Sites & Social Considerations
  - Air, Water, and Soil Protection
  - Fish, Wildlife and Biodiversity
  - Management of Forest Resources
  - Other
- Stand Level Information
  - Stand 1 Objectives
  - Stand 1 Current Conditions
  - Stand 1 Desired Future Stand Condition
  - Stand 1 Forest Management Activities
- Management Activity Schedule and Tracking
- Signatures and Approvals

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Guidance for Each Template Section

Access

* Are property boundaries posted?
* How are they marked?
* Does the landowner have legal access to the property?
* Is public access allowed?
* Address access for management purposes.
Template Considerations

- It’s a template, not a cookbook.
- All items will not apply to all properties (i.e. some properties do not have active water sources).
- Use the template as an approach to engaging landowners in the active management of their forests.
A Guide for Natural Resource Professionals on Using:
Managing Your Woodlands:
A template for your plans for the future

* Instructions for foresters and others who are helping landowner prepare plans.
* Links for accessing resources helpful in completing the plan.
Understanding Your Plan
A Guide for Landowners Using: Managing Your Woodlands:
A Template for Your Plans for the Future

Parts of Template for Landowner Input:

- Property description and history
- Goals
- Maps
- Resource management
Understanding Your Plan
A Guide for Landowners Using: Managing Your Woodlands:
A Template for Your Plans for the Future

Other guide sections for landowners:

- Assistance List
- Extensive Glossary of Terms- i.e. Aspect
- Tax and Business Management Considerations
- Timber Sale Contract Checklist
Most plans written for landowners.

“Most people have little interest in achieving goals set by someone else.”
Landowner Goals & Objectives:

- **Goals** - *(Broad statements of desired outcomes for property)*
- **Objectives** – *(Planned actions [specific and measurable] to achieve goals)*
The first step: Collecting Information (to be done with landowner)

- Owner information
- Property information, including various parcels owned
- Property history
- Past practices
- Special sites

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Maps & Photos

Corvallis Tract: 1997 Aerial Photo

Corvallis Tract Map Key:
- C1- Older Conifer Plantation, circa 1987
- C2- Older sawtimber, 65 years
- C3- Younger plantation- since 1993
- C4- Riparian forest
- C5- Christmas trees
- C6- Home and Arboretum
* Use information from published soil surveys and other sources, if available, to identify major soil types, topographic and geological features and characteristics such as site index, slope stability, and soils limitations.

* A good source for soil data is on the web at: http://websoilsurvey.nrcs.usda.gov/app/
Click on the “Start WSS” button to get started.

websoilsurvey.nrcs.usda.gov
### Map Unit Legend

#### Clackamas County Area, Oregon (OR010)

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<th>Map Unit Symbol</th>
<th>Map Unit Name</th>
<th>Acres in AOI</th>
<th>Percent of AOI</th>
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<td>Jory silt clay loam, 8 to 15 percent slopes</td>
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<td>Saum silt loam, 30 to 60 percent slopes</td>
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**Totals for Area of Interest**

|                      | 74.4 | 100.0% |

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# Web Mapping Tools

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<tr>
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</table>

*print function pending*
Natural Resource Management & Protection

For each resource identify:

1. Landowner goal
2. Steps to be taken to protect and/or enhance the resource
Forest owner must make a reasonable effort to locate and protect special sites appropriate for the size of the forest and the scale and intensity of forest management activities. (ATFS, 2010)

Examples: American Indian burial sites, historical building ruins, old cemeteries, cave entrances, spring heads, rare mineral outcroppings
“Must” versus “Should” or “May”

Where present, and relevant to the property, the plan must address High Conservation Value Forests.

Where present, relevant to the property, and consistent with landowner’s objectives, the plan preparer may consider aesthetic quality.
Air, Water and Soil Protection

- Soil protection measures
- Identify streams, wetlands, ponds, and other special riparian considerations and their protection needs, consistent with landowner objectives.
Roads & Access

- Roads are under major regulatory scrutiny.
- Assess general road conditions under property description.
- Can use internet mapping tools like Google Earth to map roads.
Fish, Wildlife and Biodiversity
Forest management activities should maintain or enhance rare species and high conservation value forests.

High conservation value forests are evaluated at the landscape level rather than the forest stand level.

For the Willamette Valley this could be oak savanna’s.
Assessing Presence of T&E Species

1. Evaluate on the ground with a professional
2. Consult an online database (such as NatureServe)
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<th>Analysis Unit</th>
<th>Taxonomic</th>
<th>Species or Habitat</th>
<th>Species Scientific</th>
<th>Relative Abundance</th>
<th>Distribution</th>
<th>GRank</th>
<th>SRank</th>
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<td>Red Tree Vole (modeled dist)</td>
<td>Arborimus longicaudus</td>
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<td>Lasionycteris noctivagans</td>
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<td>G5</td>
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Stand Level Information
(to be done by resource professionals)
Scope of the Forest Vegetation Section

- Timber cruise?
  - NO (unless landowner wants/has it)

- Detailed Inventory?
  - NO (unless landowner wants/has it)

- So what IS the scope??
  - Remember Size, Intensity, Scale, Interests

- Guidelines are “baseline” … add more detail (quantitative and qualitative) as desired and as appropriate.
Number of Layers (1, 2, 3, multiple)

For each canopy layer

* Growth stage
  * Seedling (up to 4.5 ft)
  * Sapling (1-5”)
  * Small tree (6-11”)
  * Large tree (12-29”)
  * Very large tree (30”+)

* Spacing (Horizontal Structure)
Management Activity Schedule and Tracking

* Important to develop this with the landowner.
* Make sure they understand the jargon and are committed to the activities.

Rick Fletcher, Eaglesview Forestry
Signatures and Approval

- Plan must be reviewed and approved by all agencies who landowner wishes to qualify with.
- Some additional program requirements may be necessary - i.e. NRCS requires “job sheets” for individual practices that are approved.
- Additional state by state requirements may apply.
* Can be done at any time, but should be done for any significant property changes or events.
* Encourage landowners to do annual review.
* Electronic template facilitates updates.
* Can use handwritten notes with initials.
Oregon’s Joint Planning Effort

* Began in 2000
* Now includes all major organizations involved in woodland management plans.
* Endorsement process will be completed in June 2013.
* Process has created a new landowner website: Know Your Forest
1. Plans written under
   a) the USDA-National Forest Stewardship Program (ODF in Oregon)
   b) Certification through the American Tree Farm System (OTFS in Oregon) and Forest Stewardship Council (FSC).
   c) Forestry Financial Assistance administered by the Natural Resources Conservation Service (NRCS)
   d) Plans required by OR Department of Fish & Wildlife
PATHWAYS TO STEWARDSHIP
Engaging Landowners with their Forestland

Outreach

Woodland Discovery/ MyLandPlan

Resource Elements Business Operations

Certification and Beyond

Implementing Forest Management Actions

Core Forest Management Plan

Additional Steps and Addendums
Tools for Oregon Plan Writers

* Management Plan Template/guidelines
* Mentored Planning Course
* Website: http://knowyourforest.org/

Forest Management Plan for [Property Name]

1. Introduction and Context

   Landowner(s) name(s) and address: ____________________________
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