

# **Oregon Forest Stewardship Planning Guidelines**

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# Oregon Forest Stewardship Planning Guidelines

## I. Introduction

Planning is the foundation of good forest stewardship and management. In Oregon, forest stewardship plans for private lands are developed for a variety of reasons. This booklet offers a standard set of planning guidelines and planning elements that meet the needs of a variety of stewardship plan types.

Staff members of the Oregon Department of Forestry and Oregon State University Forestry Extension Program jointly developed these guidelines. They have been reviewed and endorsed in concept by designated representatives of the Oregon Society of American Foresters (OSAF), the Oregon Tree Farm System (OTFS), the Oregon Small Woodlands Association (OSWA), and the Oregon Chapter of the Association of Consulting Foresters (ACF).

## II. Plan Types

These guidelines were designed to be used for Oregon Forest Stewardship Plans developed for the following programs:

- A. Forestry Assistance Stewardship Plan (FASP) / Resource Management Planning Stewardship Plan (RMPS) –
  - 1.) FASP  
A certified stewardship plan is required for a landowner to qualify for participation in the Forest Land Enhancement Program (FLEP). This program is designed to provide financial incentives to assist family forest landowners in defining and meeting their management objectives while protecting other natural resources on their properties. The three main objectives of the FLEP program are to help landowners meet integrated resource objectives as indicated by development of a stewardship plan, to coordinate agencies and groups working with landowners and to fulfill the goals of the Oregon Plan for Salmon and Watersheds by enhancing riparian areas and water quality. This type of plan would qualify as an Oregon Tree Farm System Stewardship Plan if desired by the landowner.
  - 2.) RMPS  
The Resource Management Planning (RMP) program is an OSU Extension Service training program designed for landowners who are aware of basic forest resource concepts and wish to develop a resource management (stewardship) plan. The program guides landowners through the preparation of a stewardship plan for their forest property including developing objectives, constraints, a resource inventory, and an action plan. The landowner who completes the RMP training program and develops a stewardship plan may wish to take further

training and become a Master Woodland Manager. This plan would generally qualify as a Forestry Assistance Stewardship Plan if requested by the landowner and approved by an ODF Stewardship Forester.

[The intent is that the FSAP and the RMPSP are fundamentally the same plan.]

B. Oregon Tree Farm System Stewardship Plan (OTFSSP) –

The Oregon Tree Farm System’s purpose is to ensure that the excellence of the American Tree Farm System is maintained in Oregon. Volunteer professional resource managers inspect and certify tree farms, but landowners must provide a management plan. These guidelines were used to develop the Oregon Forest Stewardship Plan Template. The Oregon Tree Farm System, Inc. endorses the use of the template as meeting the requirements for the management plan required to be a certified tree farm.

C. Which type of Stewardship Plan is for you?

These guidelines can be used to develop one of the types of stewardship plans explained above. Not every forest landowner needs or wants each type of plan. Which type is for you?

Forestry Assistance Stewardship Plans are appropriate for family forest landowners who want to participate in the Forest Land Enhancement Program or other incentive programs where a plan is required or desirable.

Resource Management Planning Stewardship Plans are developed by participants in an OSU Forestry Extension training program.

Oregon Tree Farm System Stewardship Plans are appropriate for industrial or family forest landowners who want to be certified by the Tree Farm program.

Landowners who want to participate in more than one of these programs are encouraged to develop a single stewardship plan that will meet the guidelines of all the programs they want to participate in.

### **III. Stewardship Plan Elements**

This section identifies the parts or elements of a stewardship plan and the kinds of information to be included in each. The amount of information and the level of detail included under each element will vary with the landowner and the plan’s purpose, but all elements need to be addressed.

Table 1, at the end of this section, shows which plan elements are required for each plan type. Landowners and plan writers need to address each element in every plan to an appropriate level of detail based on landowner goals and objectives.

A. Cover Page

The following items should be included on a cover page:

- Date of plan
- Landowner name
- Landowner address
- Landowner phone
- Landowner e-mail
- Tract name or number
- Total tract acreage
- Total forested acreage
- Tract legal description
- Latitude and longitude (to a recorded survey monument on the property)
- Land use classification
- Watershed tract is located in
- Fire protection district (wildland)
- Fire protection district (structural)
- Property tax classification
- Tree farm number
- Tree farm certification date
- Seed zone
- Plan writer name
- Plan writer address

- Plan writer phone number
- Plan writer e-mail

B. Plan Introduction

Explain the plan's purpose and how it relates to the landowner and his/her values. The landowner is identified as the decision maker and the plan is identified as suggested courses of management. Address the history of the property both before and after the present owner bought it.

C. Landowner Objectives

Describe what the landowner wants to achieve on the property. Include both goals, which are broad statements of desired outputs for the property, and objectives, which are specific and measurable. If landowner intends to make a profit from their operations, indicating profit as one of the objectives can help establish active management status for tax purposes.

D. Map/Woodland Description

Give landowner information, legal description, tax lot, boundary map, assessor's plat, property corners, adjacent property owners, and tax status. Include a map or maps of a scale appropriate for the property that show legend; property boundary; vegetation cover types; soil types; topography; access (including existing and proposed roads and culverts); streams/ponds; and other resource sites. Overlays or digital formats are allowed. In addition to the required maps, aerial photos of the property showing boundaries and other information can be included. If there are several maps, include the property map here and put the others in an appendix.

E. Forest Vegetation/Timber

Describe the existing forest types, including those in riparian areas. Include a forest type map for the property. Give the following details for each forest type: acreage, species mix, density, site index, size class, age, elevation, slope, seed zone, and aspect. Site information can be in relative terms, if site index or site class information is not available. For uneven- or all-age stands, give age or age-class range.

Give forest inventory data including a range of detail appropriate for management opportunities. Owners concerned with proprietary information may want to include volumes, grades and other detailed inventory information in an appendix

or separate report that is not shared. Harvesting plans may also be separate from Stewardship Plans.

List significant historical events for the stand such as date of origin, if planted or natural, past timber/product sales, timber stand improvements, reforestation, vegetation management, and loss events such as fire, insects and diseases.

List management opportunities for each vegetation type. (Alternatively, management opportunities can be organized according to goals and objectives listed in Section C.) Include tax designations of forested lands, as applicable.

#### F. Wildlife/Fish Habitat

Describe different species, habitat components, special protection measures needed, and improvement activities needed to meet landowner's objectives and Oregon Plan objectives. Include specified resource sites covered under the Forest Practice Rules (bird sites, threatened and endangered species, wetlands, etc.). Presence and abundance of snags and downed woody debris should be assessed for wildlife, but should also be noted for Forest Health.

#### G. Soils

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. Recommend tree species and other vegetation types based on soil types and landowner objectives. Identify erosion, drainage, and other problems through an inventory process. Include a soils map here or in the appendix.

#### H. Roads

Make general road and culvert assessment recommendations for improving, developing, and maintaining road systems to ensure good water quality and fish habitat and to meet landowner objectives. Reference locations of road improvement opportunities on plan map or road map.

Considerations to be taken into account include road locations, stream crossings, potential for sediment delivery, culvert size and condition, fish passage, and surface and road stability. Discuss skid trail design and access and identify any problems related to water quality and soil productivity. Identify road easements.

Identify road needs such as relocations, needed rebuilding, or resurfacing. Also indicate any maintenance needs like rebuilding water bars, installing rolling dips, culvert cleaning, ditching etc. All recommendations should meet or exceed Oregon Forest Practice Rules requirements. Be sure that any road construction and maintenance coordinates with any planned timber/product harvests.

I. Water Resources

Identify key local watershed boundaries and the watershed context for the property. For example, list the named stream that drains the property and the next larger stream. Indicate FPA stream classification. Identify streams, wetlands, ponds, and other special riparian considerations and their protection needs, consistent with landowner objectives. Identify water rights for both the property and registered domestic downstream water use as described in the Forest Practice Rules. Ponds and pump chances should be identified for fire protection. Assess and evaluate ponds for leaking and dike failure problems. If ponds are planned or work is needed, landowner should check with the Natural Resources Conservation Service (NRCS), or the Oregon Water Resources Department (WRD). Riparian areas and wetlands may be included here or treated as a separate section of the plan that addresses vegetation, inventory, needs, and opportunities for management/restoration. Identify opportunities for coordinated management with neighboring landowners. Identify easements for water rights.

J. Forest Health

Identify any insect, disease, animal damage, wind-throw and wildfire problems and associated management strategies to resolve problems, consistent with the landowner's objectives. Note pest management concerns and fuel levels on forest type maps (Section D).

K. Fire Plan

Provide a separate fire management plan and map that includes roads, turning radius, addressing, pump chance, water supply, fuel reduction, tree thinning, tree pruning, and creation of defensible space around structures. Note the fire protection district of property, for both structural and wildland protection.

L. Agro-forestry/Range

Identify resources and opportunities consistent with landowner's objectives. Include projected costs and revenues where applicable.

M. Archeological and Cultural Resources

Many landowners are very interested in preserving family, community and settlement history and associated resources such as cemeteries, homesteads, trails and other significant sites. List any measures needed to protect known archaeological or cultural resources to meet existing laws and landowner objectives. Cemeteries and gravesites should be protected as mandated by state and federal law. Human bones should be brought to the sheriff's attention. Cabins or buildings (>50 years old) should be identified and landowners are encouraged to consider these for preservation. State Historic Preservation Officer (SHPO) should be notified and asked to evaluate such properties. The SHPO will provide confidential consultation at no cost to the landowner.

N. Recreation

If recreation is one of the landowner's objectives, identify resources and describe and plan for opportunities. Trails should be identified and assessed and design resources should be noted. Fire safety must be addressed in recreation planning. Include anticipated costs and revenues where appropriate.

O. Aesthetic/Scenic

Describe opportunities to meet landowner objectives. Note any scenic highways and scenic rivers on or abutting properties. Identify opportunities for scenic management. Note opportunities to improve aesthetics of forest practices.

P. Threatened and Endangered Species

Habitat on many landowners' property may be important for threatened and endangered (T&E) species. Identify known T&E species and describe management and protection measures. List activities to maintain or improve T&E species habitat that are consistent with the landowner's objectives. Landowner may want to include plant as well as animal species.

Q. Forest Practice Rules

The plan and all management recommendations must meet or exceed the Oregon Forest Practice Rules as administered by the Oregon Department of Forestry. Most forest operations require filing of Notifications of Operations and a 15-day

waiting period. Some operations require filing of a written plan (OAR 629-605). Landowner should obtain a current copy of the Oregon Forest Practice Rules.

R. Assistance

Describe available financial, technical, and educational assistance. List agencies and individuals that provide assistance to family landowners, including names, addresses, phone, and e-mails. Identify assistance needed to accomplish objectives.

S. Tax and Business Management

This section includes a series of statements related to tax and business management that should be included in plans.

Property tax – Include a statement such as: “Landowners wanting to meet Forestland Program (or the Small Tract Option [STF] within the Forestland Program) status may need to have a Management Plan to qualify and may need to make special application.” The stewardship plan should document the current property tax status of the property.

Income tax – Include a statement that timber harvest and other revenue generating activities generally produce a federal and state income tax liability. Tax credits may be available for some management activities.

Estate tax – Include a statement that good estate planning can help to lessen tax liability when passing land to heirs and that landowners should seek good planning and tax advice.

Record keeping – Include a statement that good record keeping can help landowners manage their assets, increase their revenues, and minimize their tax liability.

Land Use – Document the land use classifications of the property from the county land use plan.

T. Summary of Resource Situations, Management Recommendations and Priorities

Describe resource situations and management opportunities by management unit (forest type-island or stand). These may include short-term and long-term recommendations. Build in options for recommendations, if applicable. (Recommendations need to be tied directly back to landowner goals and

objectives.) Include guidance on how specific recommendations achieve objectives.

Where applicable, address:

- Financial aspects
- Tax implications/questions
- Estate planning/passage implications
- Assistance/new skills needed to accomplish the job and associated costs

A management activity schedule should be used to summarize the timing and priority of management recommendations.

#### U. Signature Page

1. FASP / RMPSP Signature Page– see Page 13.

2. OTFSSP Signature Page should included the following:

- Date of plan
- Landowner name and signature
- Plan writer name and signature

#### V. Which Elements for Which Plans

These guidelines are intended to be used for Oregon Forest Stewardship Plans developed for the following programs:

1. Forestry Assistance Stewardship Plan (FASP) / Resource Management Planning Stewardship Plan (RMPSP)
2. Oregon Tree Farm System Stewardship Plan (OTFSSP).

Table 1 shows what plan elements are required for each plan type. Landowners and plan writers should address each element to the level of detail appropriate to landowner goals and objectives.

Table 1. Plan elements required by Stewardship Plan Types.

Element/Type	FASP	OTFSSP
A. Cover Page	X	X
B. Plan Introduction	X	X
C. Landowner Objectives	X	X
D. Map/Woodland Description	X	X
E. Forest Vegetation/Timber	X	X
F. Wildlife/Fish Habitat	X	X
G. Soils	X	
H. Roads	X	X
I Water Resources	X	X
J. Forest Health	X	X
K. Fire Plan	X	
L. Agro-forestry/Range		
M. Archeological & Cultural Resources	X	
N. Recreation	X	X
O. Aesthetic/Scenic Resources	X	X
P. Threatened and Endangered Species	X	
Q. Forest Practice Rules	X	X
R. Assistance	X	
S. Tax and Business Management	X	
T. Resource Situations, Management Recommendations & Priorities	X	X
U. Signature Page	X	X

## FORESTRY ASSISTANCE STEWARDSHIP PLAN SIGNATURE PAGE

This stewardship plan describes the existing vegetation, soils, roads, and wildlife/fisheries habitat on the property and addresses the opportunities for the protection of all natural resources while assisting the landowner in meeting his or her objectives for the management of the property. It provides guidelines for a sound strategy which reflects the landowner's management objectives and blends them with a land stewardship ethic. It focuses on the integration of all resources in the management of the property as a valuable legacy for future generations.

All plan elements listed below must be addressed during plan development. The amount of information and the level of detail included under each element will vary with the landowner and plan's purpose.

PLAN ELEMENT CHECK LIST	Plan Elements
Cover Page	X
Plan Introduction	X
Landowner Objectives	X
Map/Woodland Description	X
Forest Vegetation/ Timber	X
Wildlife/Fish Habitat	X
Soils	X
Roads	X
Water Resources	X
Forest Health	X
Fire Plan	X
Archeological and Cultural Resources	X
Recreation	X
Aesthetic/Scenic Resources	X
Threatened and Endangered Species	X
Forest Practice Rules	X
Sources of Assistance	X
Tax and Business Management	X
Management Recommendations	X
Signature Page	X

Actions recommended in this plan have no significant long-term adverse impact on any of the above listed resources. This plan does not limit or reduce any existing rights of the landowner.

**Prepared for:**

**Prepared by:**

\_\_\_\_\_  
Landowner's Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Resource Professional's Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Print Landowner's Name

*I understand that participation in the Stewardship Program may involve periodic monitoring of plan by the OR Dept of Forestry or its designee for program reporting purposes.*

County \_\_\_\_\_

\_\_\_\_\_  
Print Resource Professional's Name

**Approved by:**

\_\_\_\_\_  
ODF Representative's Signature

\_\_\_\_\_  
Date

Acres of forestland \_\_\_\_\_

\_\_\_\_\_  
Print ODF Representative's Name

## **IV Further Resources for Forest Stewardship Planning**

*Management Planning for Woodland Owners: Why and How*, EC 1125, by  
M. Bondi and C. Landgren (Oregon State University Extension Service, Corvallis, 1983).

*Management Planning for Woodland Owners: An Example*, EC 1126, by  
C. Landgren and M. Bondi (Oregon State University Extension Service, Corvallis, 1983).

*Management Planning For Your Small Woodland: An Introduction*, Video Tape #1017, by M.  
Bondi and J. Hino (Oregon State University Forestry Media Center, Corvallis, 1996).

*Putting Together a Watershed Management Plan: A Guide for Watershed  
Partnerships* (Conservation Technology Information Center, West Lafayette, IN, 1997).

*Watershed Stewardship: A Learning Guide*, EM 8714, edited by D. Godwin, F. Conway and M.  
Cloughesy (OSU Extension Service, Corvallis, 1998).