Oregon Forest Stewardship Plan Template

for use with the

Oregon Forest Stewardship Planning Guidelines

Interim Version
Revised April 2010

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Introduction to Stewardship Planning Template

This template was designed to provide a fairly simple way to write stewardship plans that are consistent with the Oregon Forest Stewardship Planning Guidelines.

The guidelines are intended to be used for Forest Stewardship Plans developed for one or more of the following purposes:

1. Forestry Financial Assistance administered by the Oregon Dept. of Forestry (ODF)
2. Certification through the Oregon Tree Farm System (OTFS).
3. Forestry Financial Assistance administered by the Natural Resources Conservation Service (NRCS)

The sections that are required for each plan type are indicated in Table 1. Additional sections and more detailed information can be added to individual plans as appropriate.
Table 1. Required elements for management plan to qualify as an ODF Stewardship Plan, Tree Farm Plan, and/or an NRCS Conservation Plan.

<table>
<thead>
<tr>
<th>Plan Element:</th>
<th>ODF Forest Stewardship Plan</th>
<th>Tree Farm Plan</th>
<th>NRCS Conservation Plan</th>
</tr>
</thead>
<tbody>
<tr>
<td>A. Cover Page</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>B. Plan Introduction</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>C. Landowner Goals &amp; Objectives</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>D. Property Map/Woodland Description</td>
<td>X</td>
<td>X</td>
<td>X</td>
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<tr>
<td>E. Forest Vegetation</td>
<td>X</td>
<td>X</td>
<td>X</td>
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<tr>
<td>F. Integrated Pest Mgt.</td>
<td>X</td>
<td>X</td>
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<tr>
<td>G. Wildlife/Fish Habitat</td>
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<tr>
<td>H. Soils</td>
<td>X</td>
<td>X</td>
<td>X</td>
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<tr>
<td>I. Roads &amp; Access</td>
<td>X</td>
<td>X</td>
<td>X</td>
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<tr>
<td>J. Water Resources</td>
<td>X</td>
<td>X</td>
<td>X</td>
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<tr>
<td>K. Forest Health</td>
<td>X</td>
<td>X</td>
<td>X</td>
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<tr>
<td>L. Invasive Species</td>
<td>X</td>
<td>X</td>
<td>X</td>
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<tr>
<td>M. Protection from Wildfire</td>
<td>X</td>
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<tr>
<td>N. Agro-forestry/Range</td>
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<tr>
<td>O. High Conservation Value Forest</td>
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<td>X</td>
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<tr>
<td>P. Special Site - Archeological, Cultural</td>
<td>X</td>
<td>X</td>
<td>X</td>
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<tr>
<td>Q. Recreation</td>
<td>X</td>
<td>X</td>
<td>X</td>
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<tr>
<td>R. Aesthetic/Scenic</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>S. Threatened and Endangered Species</td>
<td>X</td>
<td>X</td>
<td>X</td>
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<tr>
<td>T. Forest Practice Rules</td>
<td>X</td>
<td></td>
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<tr>
<td>U. Assistance</td>
<td>X</td>
<td></td>
<td>X</td>
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<tr>
<td>V. Tax and Business Management</td>
<td>X</td>
<td></td>
<td></td>
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<tr>
<td>W. Action Plan - Recommendations &amp; Priorities</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>X. Signature Page</td>
<td>X²</td>
<td>X³</td>
<td></td>
</tr>
<tr>
<td>Y. NRCS Plan Approval</td>
<td></td>
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<td>X</td>
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</tbody>
</table>

1. High Conservation Value Forest: forests of outstanding and critical importance due to their environmental, social, biodiversity or landscape values. Oregon White Oak woodlands in the Willamette Valley is an example.
2. Plans written and/or approved by ODF use “ODF Forestry Assistance Stewardship Plan Signature Page”.
3. Tree Farm Inspectors approve management plans as part of their field inspections.
(Name of Property) **Forest Stewardship Plan**

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: 

Land use classification: 

Fire protection district (wildland): 

Fire protection district (structural): 

Watershed tract is located in: 

Property tax classification: 

Tree farm number:* 

Tree farm certification date:* 

Seed zone: 

Plan writer name: 

Plan writer address: 

Plan writer phone: 

Plan writer e-mail: 

*For Tree Farm System Plans only
B. Plan Introduction

Explain the plan’s purpose and how it relates to the landowner and his/her values. Address the history of the property both before and after the present owner bought it.
C. Landowner Goals & Objectives:

Describe what the landowners want to achieve on their property:

Goals - (*Broad statements of desired outcomes for property*):

1. 
2. 
3. 
4. 
5. 
6. 

Objectives – (*Planned actions [specific and measurable] to achieve goals*):

1. 
2. 
3. 
4.
D. Property 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.
E. **Forest Vegetation**

Describe the existing forest vegetation, including those in riparian areas. Include a forest type or stand map for the property. Give the following details for each stand or vegetation type (make copies of this page as needed):

<table>
<thead>
<tr>
<th>Stand number:</th>
<th>____________________________________________</th>
</tr>
</thead>
<tbody>
<tr>
<td>Stand acreage:</td>
<td>____________________________________________</td>
</tr>
<tr>
<td>Forest type:</td>
<td>____________________________________________</td>
</tr>
<tr>
<td>Tree species mix:</td>
<td>____________________________________________</td>
</tr>
<tr>
<td>Tree density:</td>
<td>____________________________________________</td>
</tr>
<tr>
<td>Site index:</td>
<td>____________________________________________</td>
</tr>
<tr>
<td>Size class:</td>
<td>____________________________________________</td>
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<tr>
<td>Age:</td>
<td>____________________________________________</td>
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<tr>
<td>Elevation:</td>
<td>____________________________________________</td>
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<tr>
<td>Slope:</td>
<td>____________________________________________</td>
</tr>
<tr>
<td>Seed Zone:</td>
<td>____________________________________________</td>
</tr>
<tr>
<td>Aspect:</td>
<td>____________________________________________</td>
</tr>
<tr>
<td>Forest inventory data:</td>
<td>____________________________________________</td>
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<td></td>
<td>____________________________________________</td>
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<tr>
<td></td>
<td>____________________________________________</td>
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<tr>
<td>Understory vegetation:</td>
<td>____________________________________________</td>
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<td></td>
<td>____________________________________________</td>
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<td></td>
<td>____________________________________________</td>
</tr>
</tbody>
</table>
* As an alternative, management opportunities / recommendations can be organized by goals and objectives instead of stand by stand.
F. Integrated Pest Management

Describe strategy for controlling destructive insect, disease and vegetative pests. Strategies should use a variety of complementary efforts such as mechanical devices, chemicals, genetic, biological or cultural management.

G. Wildlife/Fish Habitat

Describe wildlife habitat (including vegetative structure and species, downed woody debris, etc.), wildlife and fish species that occur or could occur on the property. Describe property improvements and/or special protection measures needed to meet landowner’s objectives, Oregon Plan objectives, and that may be needed under Forest Practice Rules.

H. Soils

Use information from published soil surveys and other sources, if available, to identify and map 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/
I. Roads & Access

Make general road and culvert recommendations (including map) for improving, developing, and maintaining road systems to ensure good water quality and fish habitat and to meet landowner objectives:

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

J. Water Resources

Identify streams, wetlands, ponds, and other special riparian considerations and their protection needs, consistent with landowner objectives. Identify FPA stream classifications. Identify ponds and pump chances for fire protection. Identify opportunities to coordinate management with neighboring landowners:

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

K. Forest Health

Identify any insect, disease and wildfire problems and associated management strategies to resolve problems, consistent with the landowner’s objectives:

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________
L. **Invasive Species**

Identify any invasive plant or animal species present on the property and associated management strategies to resolve problems, consistent with the landowner’s objectives:

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

M. **Protection from Wildfire:**

Provide a separate fire management plan (and map) that includes access roads, turning radius, pump chance, water supply, fuel reduction, tree thinning, tree pruning and defensible space around structures. List agency(s) that protect structures and forests (note: Oregon Department of Forestry does **not** provide structural fire protection).

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

N. **Agroforestry/Range:**

Identify resources and opportunities consistent with landowner’s objectives.

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________
O. High Conservation Value Forest

If appropriate, identify and describe strategy for managing forest type that has outstanding and critical importance due to its environmental, social, biodiversity or landscape values. Examples could include Oregon White Oak in the Willamette Valley, or Quaking Aspen in eastern Oregon.

P. Special Sites - archeological, cultural resources, and other sites of unique values.

List any measures needed to protect known archaeological, cultural, historical, geological, biological, or ecological sites of value to meet existing laws and landowner objectives:

Q. Recreation

If recreation is one of the landowner’s objectives, identify resources and describe and plan for opportunities:
R. 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:

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

S. Threatened and Endangered Species

Identify known threatened and endangered (T&E) species and describe protection measures. List activities to improve T&E species habitat that are consistent with the landowner’s objectives: Check with local ODF office for FPA Protected Resource Sites.

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

T. Forest Practice Rules

This 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.
U. Assistance

Describe available financial, technical, and educational assistance. List agencies and individuals that provide assistance to family landowners. Identify assistance needed to accomplish objectives.

V. Tax and Business Management

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

Property tax – 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.

Income tax – Timber harvest and other revenue generating activities generally produce a federal and state income tax liability. Tax credits may be available for some activities. [http://timbertax.org](http://timbertax.org)

Estate tax – Good estate planning can help to lessen tax liability when passing land to heirs. Landowners should seek good planning and tax advice.

Record keeping – Good record keeping can help landowners manage their assets, increase their revenues, and minimize their tax liability.
W. Action Plan – Management Recommendations & Priorities
Describe management opportunities by management unit or stand. These may include short-term (5 year) and long-term (> 5 year) recommendations. *(Recommendations need to be directly tied back to the landowner goals and objectives listed in Section C.* ) Include guidance on how recommendations achieve objectives as applicable.

1. 
   
2. 
   
3. 
   
4. 
   
5. 
   
6. 
   
7. 
   
8. 
   
9. 
   

Landowner plans to revise / update the stewardship plan every _______ years.
This stewardship plan describes the existing vegetation, soils, 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

<table>
<thead>
<tr>
<th>Element</th>
<th>Plan Elements</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cover Page</td>
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<td>Plan Introduction</td>
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<td>Landowner Objectives</td>
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<td>Map/Woodland Description</td>
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<tr>
<td>Forest Vegetation/ Timber</td>
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<tr>
<td>Wildlife/Fish Habitat</td>
<td>X</td>
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<tr>
<td>Soils</td>
<td>X</td>
</tr>
<tr>
<td>Roads</td>
<td>X</td>
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<tr>
<td>Water Resources</td>
<td>X</td>
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<td>Forest Health</td>
<td>X</td>
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<tr>
<td>Fire Plan</td>
<td>X</td>
</tr>
<tr>
<td>Archeological and Cultural Resources</td>
<td>X</td>
</tr>
<tr>
<td>Recreation</td>
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<td>Threatened and Endangered Species</td>
<td>X</td>
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<tr>
<td>Forest Practice Rules</td>
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<tr>
<td>Sources of Assistance</td>
<td>X</td>
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<tr>
<td>Tax and Business Management</td>
<td>X</td>
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<tr>
<td>Management Recommendations</td>
<td>X</td>
</tr>
<tr>
<td>Signature Page</td>
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</tr>
</tbody>
</table>

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:**

Landowner’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 ________________________________

Acres of forestland __________

**Prepared by:**

Resource Professional’s Signature __________________________ Date __________________

Print Resource Professional’s Name

**Approved by:**

ODF Representative’s Signature __________________________ Date __________________

Print ODF Representative’s Name
Y. NRCS CONSERVATION PLAN APPROVAL

Completing this forest management plan is the first step in completing an approved Conservation Plan through the Natural Resources Conservation Service (NRCS). A completed and approved Conservation Plan is the first step to accessing voluntary technical and financial assistance available from the NRCS and local Soil and Water Conservation Districts of the property.

This plan describes the existing vegetation, soils, 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.