A well-written management plan is one of the most useful tools available to woodland owners; unfortunately, it’s also one of the easiest to ignore. As Extension foresters, we get calls nearly every day about tree health, log marketing, vegetation management and other seemingly urgent issues—yet in our combined 35-plus years of experience, the number of urgent requests for management planning assistance could be counted on one hand.

But they do happen. In one example, a county assessor started requiring plans for landowners to get a forest deferral. Another occurred when a local mill began requiring Tree Farm certification (which requires a written management plan) as a precondition to purchasing logs from family forestlands. In both examples, the landowners experienced some outside influence that “pushed” them into preparing a management plan, but there are many other reasons why landowners should want to develop these tools.

One of the early publications developed by OSU Extension Forestry was a timeless piece entitled Management Planning for Woodland Owners: Why and How. Looking back at this publication, it’s striking that the people featured in its photos are either deceased or long-since moved off the tree farm. The stars of the article never actually finished their management plan, and the property has changed hands four times. Each owner wished the past owner had written down what was done on the farm, but no one ever had. The current owner recently asked why one area did not grow trees well. Answer—the prior owner dismantled the drain system by mistake. Another owner wondered why the grand fir he planted died. Answer—the field had annosus root rot. Had each owner maintained a management plan and passed that information along, each would have been empowered to make better decisions and more effectively allocate their limited time, money and growing space.

**Topographic maps use contour lines to express the shape of the land surface. They are very useful for planning road location, identifying logging options, estimating site characteristics, finding boundaries of watersheds, and a host of other management considerations.**

**Aerial photographs are excellent planning tools. They help you identify locations of vegetation units, roads, streams and other resources.**

Kurt Spingath, CF

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We are all like that. I know I need a Will, but hey, I’m busy and feel just fine today. We know we should have a plan for a disaster, but it’s sunny out, or at least not flooding. There are other things we would rather do with our time…

We are not likely to change human nature with this article. But we do hope to convince you of three things relating to management plans:

1. They are useful;
2. There are many resources to help you learn about and develop your plan; and
3. You can do it (or have it done).
So, let’s get started!

Why plan and why plans are useful

To those of us preaching the utility of management plans, the list of benefits is endless—but in the interest of space, we can summarize them in the four statements that follow. We recognize that every forest ownership situation is different, but experience has taught us there are many commonalities.

1. Plans help you consider what you might do on your property. Planning requires careful thinking about why you own your property, what you would like to see happen to it, what it might produce, and how much time and money you will require. Thinking and learning about possible management options will go a long way toward helping you establish your objectives.

When you set objectives, you must also consider your constraints or limitations. Personal and economic constraints might include limited time, money and equipment. Biological and physical constraints might include poor drainage, steep ground, rocky soils, disease, and insect problems. These limitations may narrow your options and require you to modify your objectives. We find it’s common for landowners to start the planning process with one set of objectives and end with something different—writing the plan revealed things that were mutually exclusive, and, in many cases, opened the landowners’ eyes to previously unrecognized opportunities.

An integral part of setting attainable objectives involves knowing what you have, and this requires a systematic assessment of the resources present on your property. This can be as simple as walking the entire property and making subjective observations, or as complex as a full-blown resource inventory quantifying plant growth and yield, log grades, road conditions, habitat quality, etc. The key is to make this assessment sufficiently detailed to provide the information needed to reach your objectives.

2. Efficient planning saves you time and money and helps avoid costly mistakes that may not be correctable. Most of us have limited amounts of land, time and capital. This means that you must make careful use of these resources. By developing a well-organized management plan, you can prepare a logical sequence of forest operations, rather than a hit-or-miss schedule. Your plan can identify what needs to be done, and how and when to do it, before you begin. For example, you can order seedlings at the correct time, and complete the site preparation and weed control on schedule, with little motion and money wasted.

Planning will also help you work with forest advisers. A good plan shows the extent of your resources quickly and allows forest advisers to outline options and make suggestions based on your needs and objectives.

3. A management plan can be a handy way of organizing your records and keeping track of activities on your property. Good woodlot management
requires good recordkeeping. You will benefit from keeping notes on all activities, including reforestation, thinning, harvesting, equipment purchases, etc. For example, reforestation records should include notes about site preparation, planting dates, tree species, stock (size, nursery, etc.), herbicides and animal protection methods. Maintaining this information will make the next reforestation action easier (you already know what to do) and will help you determine what worked best.

You should also document your management results. Did the seedlings survive? Was the planting stock of good quality? Was the herbicide effective? Answering these questions can help you avoid repeating things that didn’t work.

In addition, be certain you document all financial details like costs, incomes, receipts and bills-of-sale. Complete and accurate financial records will be necessary for completing tax forms and the many other business aspects of your tree farm. Your accountant can help you organize your financial records, or you’re welcome to use OSU Extension Circular 1187 (available at http://extension.oregonstate.edu/catalog/pdf/EC/EC1187.pdf), which shows one way to organize records in a forest management plan.

4. Plans demonstrate to others your commitment and intent in continued woodlot management.
ning commissions and the like often require some proof of your commitment to long-term forest management. Management plans are an excellent source of evidence to show this commitment. Furthermore, sawmills are increasingly stipulating certification through the American Tree Farm Association, or another certification provider, as a condition for purchasing logs from woodland owners—and this requires you to have a management plan in place.

Management plans may also be preconditions for special assessments (to reduce your land’s taxable value) or to gain access to cost share programs offered by state and federal agencies.

**Parts in your plan**

There is no one “official” format for a management plan, but there are templates that can serve as guides. While the templates vary in specifics, most management plans have common elements. These include:

- **A cover page** with basic information (landowner name and address, tract name and legal description, number of acres, land use classification(s), fire protection district, seed zone, etc.). The cover page will also state the date of the plan’s last revision and the name of the person who wrote it (if different from the landowner).

- **An introduction** that sets the context for the plan. This may also be called a general description, and may include a component of the site’s history.

- **Written goals and objectives** that describe what the landowner wants to achieve. Goals are broad statements of intent (e.g., maintain a stable income stream), while objectives are more specific (e.g., generate $10,000 in after-tax income each year from timber harvest activities). Goals and objectives often have a big influence on the level of detail a plan requires—more complicated objectives require more detailed plans.

- **Maps and aerial photos** that provide a visual representation of the property and its various resources. Almost all plans contain, at a minimum, a property map that shows boundary lines, roads, streams and other water features, and the location of vegetation features. Other very useful planning tools include topographic maps (which provide landform information), soils maps (which outline areas of similar soil type), and aerial photos (which show vegetation features). Most woodland owners find their maps and aerial photos to be the parts of the plan they reference most frequently.

- **Stand (or other vegetation unit) descriptions** that list key details for each area of relatively uniform vegetation on the property. A typical description might read: “Stand A is comprised of 41 acres of mixed Douglas-fir (80%), grand fir (15%) and bigleaf maple (5%) on a northwest facing slope. It is fully stocked, with an estimated average diameter of 13 inches diameter at breast height.”

Do You Need a Timber Cruise?

Too many landowners put off writing a management plan because they lack the skills to inventory their timber or lack the money to hire it done. This is unfortunate, because in many cases the landowner’s objectives could be met without the detailed information gained from a timber cruise. Objectives focused on aesthetics, forest health, wildlife habitat, recreation and even some timber management can often be met with rather basic, subjective descriptions of the resources involved. More detailed inventories, cruises or appraisals become necessary when buying and selling timber, establishing intensively managed sustained yield harvesting systems, using uneven-aged silvicultural systems, setting up estate plans, or buying and selling timberland. Match the level of detail in your stand descriptions to your objectives!
Management Plans:  
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likely include more detail, such as stand volume and growth rate for each species, stand age, soil type, site index and the stand’s management history.

- An action plan that lists what and when you plan to conduct certain activities (e.g., add all-weather rock surface to mainline road during summer of 2007). As you near this date, you should add even more detail to the action plan to document who will do the work, how much it will cost, what constraints you will face, specific dates for the work to begin and end, etc.

In addition to these common planning elements, most plans contain information that relates specifically to individual landowner’s objectives, or the objectives of the organization through which the plan is being developed. Thus, some plans include sections on soils, roads, water resources, forest health, fire protection, non-timber resources, wildlife, fish, archaeological or cultural resources, recreation, aesthetics, threatened or endangered species, laws impacting forest management, sources of assistance, tax and business information, contracts and agreements. For instance, landowners interested in wildlife might include a section on wildlife habitat, species known to be present, and plans to enhance habitat for desired species. Persons seeking recognition by the American Tree Farm System would make sure their plan included the sections listed in that organization’s planning template. Landowners seeking financial assistance through a state or federal agency must cover the required elements of those agencies’ plan formats.

Got a plan? Use it!

If you want your management plan to be useful, you need to have a high level of input into its development and you need to keep it up-to-date. This does not mean you need to personally write the document, but you should be actively involved in setting goals and objectives, identifying constraints and providing background information. Once the plan is written, never consid-
er it complete! Management plans should be living documents. Maintain an accurate record of your management activities and update stand descriptions whenever you have new information. Review the entire document at least once every five years, and be sure to share it with family members, business partners, contractors and others who need to understand your intent for the property.

Help is available

Writing a management plan may seem daunting, but help is available. The Extension forestry programs in Idaho, Montana, Oregon and Washington each offer classes, coached processes, plan templates and other materials that will help you compile your plan. In addition, these states’ forestry departments each participate in the Stewardship Forestry Program, offering technical and financial assistance for management plan development. The American Tree Farm System offers a template meeting its plan requirements. Additionally, most consulting foresters will write management plans for their clients.

Don’t delay—Plan today!

Written plans are excellent tools for any forest manager and they’re not nearly as difficult to develop as most people envision. The benefits of developing one far outweigh its cost (whether in dollars or time). If this article hasn’t won you over, read the comments provided by other landowners in this issue—they each found value in the planning process. So, contact your Extension forester or other forestry professional and get started today!

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