

Management Planning for the Family Forest Owner

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A forest management plan is a written document designed to help you manage, protect, and enhance all forest resources to meet your needs and objectives. By recording planned and completed management projects and cultural practices in a plan, you can track your progress and leave a record of your forest stewardship. A plan will help you prioritize, make sound decisions, and schedule future actions. A plan also provides a roadmap for the next generation. Too often, landowners fail to share decisions concerning management with other family members.

Your needs and financial resources, along with size of the forest property, will determine your management plan's complexity. Without a plan, management may be sporadic, spur-of-the-moment, or just guesswork. Management plans need not be complicated, but they should accurately define and schedule the cultural practices needed to attain your objectives.

The cost to prepare your plan, whether in terms of personal time or consultant fees, should be directly proportional to the plan's detail. The Idaho Forest Stewardship Program, the American Tree Farm System, and other nationally recognized programs have developed frameworks for plans that will meet most family forest landowner's needs and qualify their land for specific forest land property tax designations, cost-share programs, or certification by an independent organization.

Contact your local Idaho Department of Lands (IDL) office for information on the Idaho Forest Stewardship Program or the American Tree Farm System. Cost-share payments may be available through the IDL for private consulting foresters to develop a forest stewardship plans for you.

Once you actively implement your management plan, the property may become eligible for recognition as a Stewardship Forest, an American Tree Farm, or a Certified Forest. An approved management plan under any of these criteria normally meets the requirement to qualify for forestland property tax rates at your county assessor's office.

Planning Steps

The management plan is the product of systematic family planning efforts. It links planning, communications, and effective management and use or enjoyment of your forest resources. The following planning steps can be used as a guide to help you write your own management plan. For a more comprehensive summary of management planning with detailed worksheets, see Washington State University publication EB 2016, *Forest Stewardship Planning Workbook*, available online at pubs.wsu.edu or by calling (800) 723-1763.

1. Determine goals and objectives.

The first step in planning is to develop a list of goals and objectives for ownership of your forest. Goals are broad statements of general intentions, and are usually not something you can measure, see, or hear. They reflect your basic values, such as having a healthy, attractive forest that you enjoy visiting or showing to others.

In defining your goals, determine what you value and the when, what, and how much you want from your forest. For example, one goal may be to maximize income from wood production. A beautiful forest and abundant wildlife are examples of non-revenue-generating ownership goals that can be accomplished through

activities like harvest or thinning that also meet other goals. When you have multiple goals (most family forest owners do), be sure to set priorities.

Objectives are more narrow and precise, measurable and concrete. A goal such as “to improve the forest for wildlife” is fine but will require more specific objectives to guide you toward sound decisions. Leaving four sound snags per acre for cavity nesting wildlife is an objective. Similarly, diversifying tree species composition (a goal) might be met by having at least five species with each species comprising at least 10% of total basal area (the objective). Both goals and objectives may vary by location in your forest.

2. Inventory your forest resources.

The second step is to inventory your forest resources. A tree inventory usually assesses tree species present, stand density, tree age distribution, tree diameters and height (to determine volume), and growth rates. Tree health including pathogens (insects, disease, etc) should also be assessed. Other resources such as soils, wildlife habitat, livestock grazing, streams, and other water sources should be included in your inventory where present.

You might conduct your inventory with the help of natural resource professionals or on your own. Several forest inventory/evaluation guides for landowners and professionals are listed at the end of this publication.

Inventories can be guided by aerial photographs, topographic maps, soil surveys, and more recently, actual aerial measurements using laser technologies. Different maps show boundaries, roads, developments, land uses, topography, soils, stands, vegetation types, and other land uses. At a minimum, you should obtain aerial photos and soil maps (available from Natural Resources Conservation Service or Farm Service Agency offices).

The inventory process will allow you to identify land areas that possess similar characteristics or share access and for which you have similar goals and objectives. You can treat these areas as “units” for the plan’s duration. These units become the basis for decisions and future actions.

3. Identify potential management practices.

Once you have identified your goals and objectives and inventoried your forest, consider all reasonable management practices that will help

you achieve your goals and objectives. Some practices to consider include the following:

- Thinning trees to reduce vulnerability to insects and disease
- Tree planting to improve species composition, stocking, or tree qualities (form, disease resistance, etc.)
- Tree thinning, pruning, seed tree cultivation, disease sanitation, seedling release, etc., to improve the timber stand
- Creating openings to improve wildlife habitat and browse
- Harvesting timber for profit
- Building/improving/maintaining roads and trails
- Establishing fire hazard reduction and/or protection measures around buildings (for example, mowing grass, pruning trees, eliminating brush)
- Controlling brush and weeds
- Installing erosion control devices
- Fencing for livestock

4. Assess labor, equipment, and financial resources and constraints.

Once you have identified management practices, evaluate the labor and financial resources necessary to carry them out and prepare a budget as part of the plan. Consider how much money and time you can devote to such practices, when that time is available to you, and if the practices are economically feasible. Also consider access to or availability of the necessary equipment, facilities, and/or materials to conduct management practices. In some cases, it is feasible to do the work yourself. Other practices may require contractors, often under the supervision of a natural resources professional.

5. Develop an activity schedule.

Prepare a schedule that lists management activities and when you expect to perform them. This should cover up to 10 years or longer. If you have a large acreage, some activities may occur every year, usually on different units. If the land ownership is small, management activities may occur less often, perhaps once every 5 or 10 years. The activity schedule can be updated on a regular basis, as can the entire plan, and should be shared with family members on a regular basis. As an example, figure 1 maps five forest units, or “stands,” (and two nonforest units) with appropriate actions listed in table 1.

Figure 1. Aerial photograph of Jack and Jill's property.

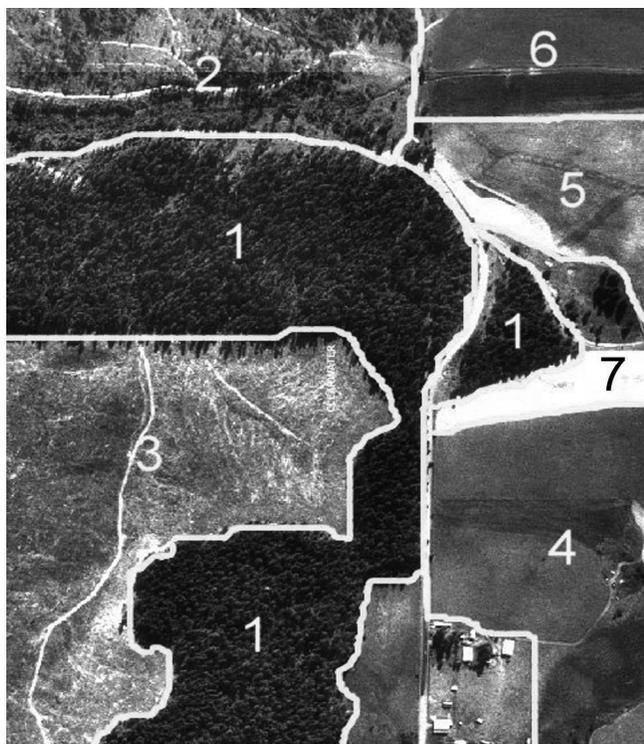


Table 1. Action plan for Jack and Jill's property.

Unit	Stand type	Age in years	Acres	Current action	5-year action	10-year action
No. 1	Douglas-fir/grand fir/ponderosa pine	100 (even age)	55	Design and build access roads. Group selection harvest cut taking 20%	Group selection harvest taking 20%. Designate wildlife snags	Group selection harvest taking 20%. Do road condition survey
No. 2	Douglas-fir/ponderosa pine	5-100 (uneven age, seed tree)	20	Control weeds and brush. Plant pine and larch if deficient stocking levels exist	Check seedling survival. Selection cut mortality. Delineate wildlife snags	Selection cut residual seed trees. Survey roads/trails and improve if necessary
No. 3	Ponderosa pine/larch	1-5 (natural regeneration from surrounding stands and seed from cut trees)	30	Control competing vegetation. Do stocking survey. Plant pine and larch in gaps	Survey mortality. Replant if needed. Retreat competition if necessary	Survey seedling mortality. Pre-commercial thin if necessary. Survey road & skid trail conditions and improve if necessary
No. 4	Small grains and lentils	1-year rotation	25	Sample soil for nutrient status	Sample soil. Amend nutrients	Sample soil. Amend nutrients
No. 5	CRP (Conservation Reserve Program)	5 (existing hay field)	12	Spot treat with herbicides. Convert from hay field to forest by planting pine and larch	Evaluate tree growth and health. Retreat competition	Prune trees. Mow excess grass to reduce fire hazard
No. 6	Hay field/grazing	3 (grass mix)	10	Based on soil test results, fertilize in April. Hay in July. Graze after haying. Check fences	Reseed. Scout for weeds. Check soil nutrient status. Check fences	Same as 5-year action
No. 7	Home/shop/recreation area		8	Watch for weeds. Build picnic pavilion	Survey for weeds	Survey for weeds. Check pavilion roof

6. Write the plan.

Your plan should be a working document that covers long-term (20-30 years) actions. The plan should be flexible and re-evaluated every 3-5 years for changes in goals and/or management actions or natural conditions. Forces of nature may create the need to conduct unexpected management activities.

Documentation should include your goals and objectives, inventory data, and resource maps. It should also include the activity schedule listing what to do, where it should be done, and when it should be accomplished.

7. Keep good records.

It will be difficult to update your plan and make sound decisions regarding future activities unless you keep accurate records of what you have done and when. Records are also important for tax and estate issues. Records should contain everything mentioned above as well as any timber sales agreements, contracts, insurance policies, easements and deeds, and other items such as receipts for expenditures.

For more information

For additional information on management plans and on-site evaluation of your family forest land, contact your local University of Idaho Extension office. They can provide forestry information, referrals, and the following publications. You can also order University of Idaho publications directly from Educational Publications Warehouse: P.O. Box 442240, Moscow, ID 83844-2240; (208) 885-7982; calspubs@uidaho.edu.

Evaluating Private Forest Ecosystems for Silvicultural Prescriptions and Ecosystem Management Planning. Bulletin 59. Idaho Forest, Wildlife and Range Experiment Station, Moscow. 1996. *Includes an inventory guide.*

Forest Stewardship Planning Workbook. An Ecosystem Approach to Managing Your Forestland. EB 2016. Washington State University Extension, Pullman. 1995. *Includes an inventory guide.*

Evaluating Wildlife Habitat for Managing Private Forest Ecosystems in the Inland Northwest. Bulletin 60. Idaho Forest, Wildlife and Range Experiment Station, Moscow. 1996. *Includes an inventory guide.*

Are Your Streams Healthy? Stream Quality Survey for Managing Private Forest Ecosystems. Bulletin 61. Idaho Forest, Wildlife and Range Experiment Station, Moscow. 1996. *Includes an inventory guide.*

Calculating Timber Removal Costs Under Ecosystem Management. Bulletin 62. Idaho Forest, Wildlife and Range Experiment Station, Moscow. 1996.

Contracting for Timber Harvest Under Ecosystem Management. Bulletin 63. Idaho Forest, Wildlife and Range Experiment Station, Moscow. 1996.

Timber Sales Agreement. EB 0961. Washington State University, Pullman. 1981.

Logging Selectively: A Practical Field Guide to Partial Timber Harvesting in Forests of the Inland Northwest and Northern Rocky Mountains. PNW 534. University of Idaho Extension, Moscow. 2000.

Forestry BMP's: Forest Stewardship Guidelines for Water Quality. BUL 745. University of Idaho Extension, Moscow. 1996.

Web sites

University of Idaho Extension Forestry
<http://www.cnr.uidaho.edu/extforest/>

Idaho Department of Lands Forestry Assistance
<http://www.idl.idaho.gov/Bureau/forasst.htm>

American Tree Farm System
<http://www.treefarmssystem.org/>

Forest Stewardship Council <http://www.fscus.org>

Forest Stewardship Program, USDA Forest Service
www.fs.fed.us/spf/coop/programs/loa/fsp/shtml

Getting help and recognition for your forest

Forest Stewardship Program

<http://www.fs.fed.us/spf/coop/programs/loa/fsp/shtml>

This program of the USDA Forest Service provides technical assistance, through state forestry agency partners, to nonindustrial private forest owners to encourage and enable long-term forest management. A primary focus is the development of comprehensive, multi-resource management plans that provide landowners with the information they need to manage their forests for a variety of products and services.

American Tree Farm System

<http://treefarmssystem.org>

Landowners who want to become certified Tree Farmers in the American Tree Farm System (ATFS) allow a qualified ATFS forest professional to inspect their property. If the property meets the organization's standards of sustainability for forest certification, the landowner receives a certificate and the recognizable diamond-shaped tree farm sign. The property is reinspected every 5 years to maintain certification. There is no charge to the landowner for the inspection.

Forest Stewardship Council

<http://www.fscus.org>

Forest certification through the council is a voluntary market mechanism through which forests are certified against a strict set of environmental and social standards. All producers and manufacturers along the supply chain are certified to ensure that the final product bearing the FSC logo originated from a certified forest.



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