

**Oregon Forest Stewardship Plan Template**  
for use with the  
**Oregon Forest Stewardship Planning Guidelines**

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**Interim Version**  
**Revised October 2009**

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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)  
or
- 2 Certification through the Oregon Tree Farm System (OTFS).

To qualify for forestry financial assistance administered by the USDA Natural Resources Conservation Service (NRCS), a separate activity plan needs to be written according to NRCS specifications.

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 a management plan to qualify as a Stewardship and/or Tree Farm Plan.

<b>Plan Element:</b>	<b>Forest Stewardship</b>	<b>Tree Farm</b>
A. Cover Page	X	X
B. Plan Introduction (history)	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	X
H. Roads	X	X
I. Water Resources	X	X
J. Threatened and Endangered Species	X	X
K. Archeological & Cultural Resources	X	X
L. Management Recommendations & Priorities	X	X
M. Forest Practice Rules	X	
N. Protection from Wildfire	X	
O. Recreation	X	X
P. Aesthetic/Scenic Resources	X	X
Q. Assistance	X	
R. Forest Health		
S. Tax and Business Management		
T. Agro-forestry/Range		
U. Signature Page	X	X <sup>1</sup>

X<sup>1</sup> Tree Farm uses its Form 004 to record landowner and certifying forester signatures.

# Forest Stewardship Plan for \_\_\_\_\_

## 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



**C. Landowner 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. \_\_\_\_\_  
\_\_\_\_\_

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6. 

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7. 

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8. 

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9. 

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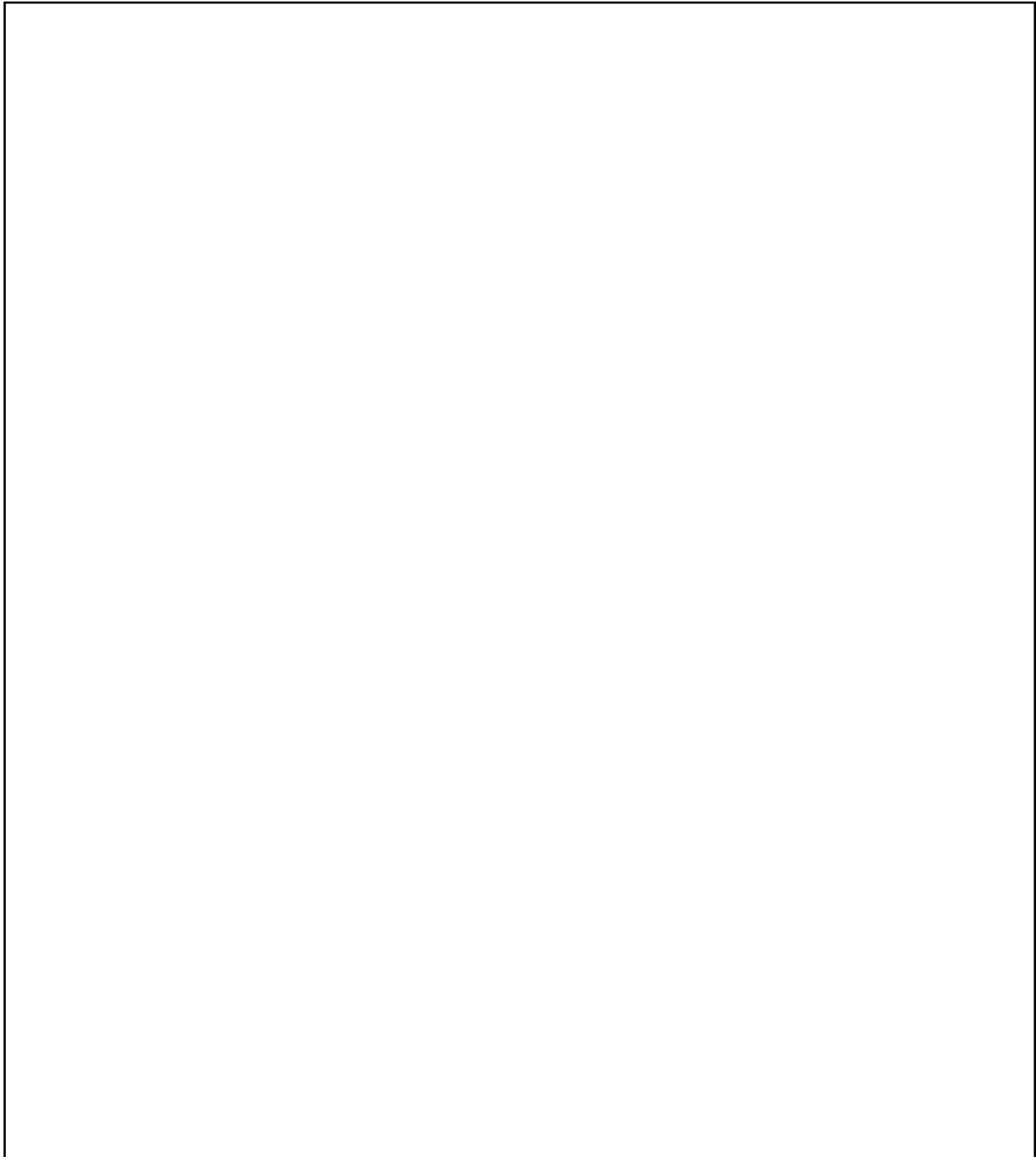
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10. 

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**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/Timber

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):

Stand number: \_\_\_\_\_

Stand acreage: \_\_\_\_\_

Forest type: \_\_\_\_\_

Tree species mix: \_\_\_\_\_

\_\_\_\_\_

Tree density: \_\_\_\_\_

Site index: \_\_\_\_\_

Size class: \_\_\_\_\_

Age: \_\_\_\_\_

Elevation: \_\_\_\_\_

Slope: \_\_\_\_\_

Seed Zone: \_\_\_\_\_

Aspect: \_\_\_\_\_

Forest inventory data: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Understory vegetation: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Stand history: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Management opportunities\*: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

\*As an alternative, management opportunities / recommendations can be organized by goals and objectives instead of stand by stand.

**F. 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.

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**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:

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**H. 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:

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**I. 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:

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**J. Forest Health**

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

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**K. Fire Plan:**

Provide a separate fire management plan (and map) that includes roads, turning radius, pump chance, water supply, fuel reduction, tree thinning, tree pruning and defensible space around structures:

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**L. Agroforestry/Range:**

Identify resources and opportunities consistent with landowner's objectives.

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**M. Archeological and Cultural Resources**

List any measures needed to protect known archaeological or cultural resources to meet existing laws and landowner objectives:

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**N. Recreation**

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

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**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:

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**P. 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:

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**Q. 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.

## **R. Assistance**

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

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## **S. 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 management activities.

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.

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

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

**T. Summary of Resource Situations, Management Recommendations & Priority**

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. \_\_\_\_\_  
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5. \_\_\_\_\_  
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6. \_\_\_\_\_  
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7. \_\_\_\_\_  
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8. \_\_\_\_\_  
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9. \_\_\_\_\_  
\_\_\_\_\_
10. \_\_\_\_\_  
\_\_\_\_\_

Landowner plans to revise / update the stewardship plan every \_\_\_\_\_ years.



## FORESTRY ASSISTANCE STEWARDSHIP PLAN SIGNATURE PAGE

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

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 \_\_\_\_\_

\_\_\_\_\_

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

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

**Approved by:**

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

\_\_\_\_\_  
Date

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