

Northwest Woodlands

A Publication of the Oregon Small Woodlands, Washington Farm Forestry, Idaho Forest Owners & Montana Forest Owners Associations

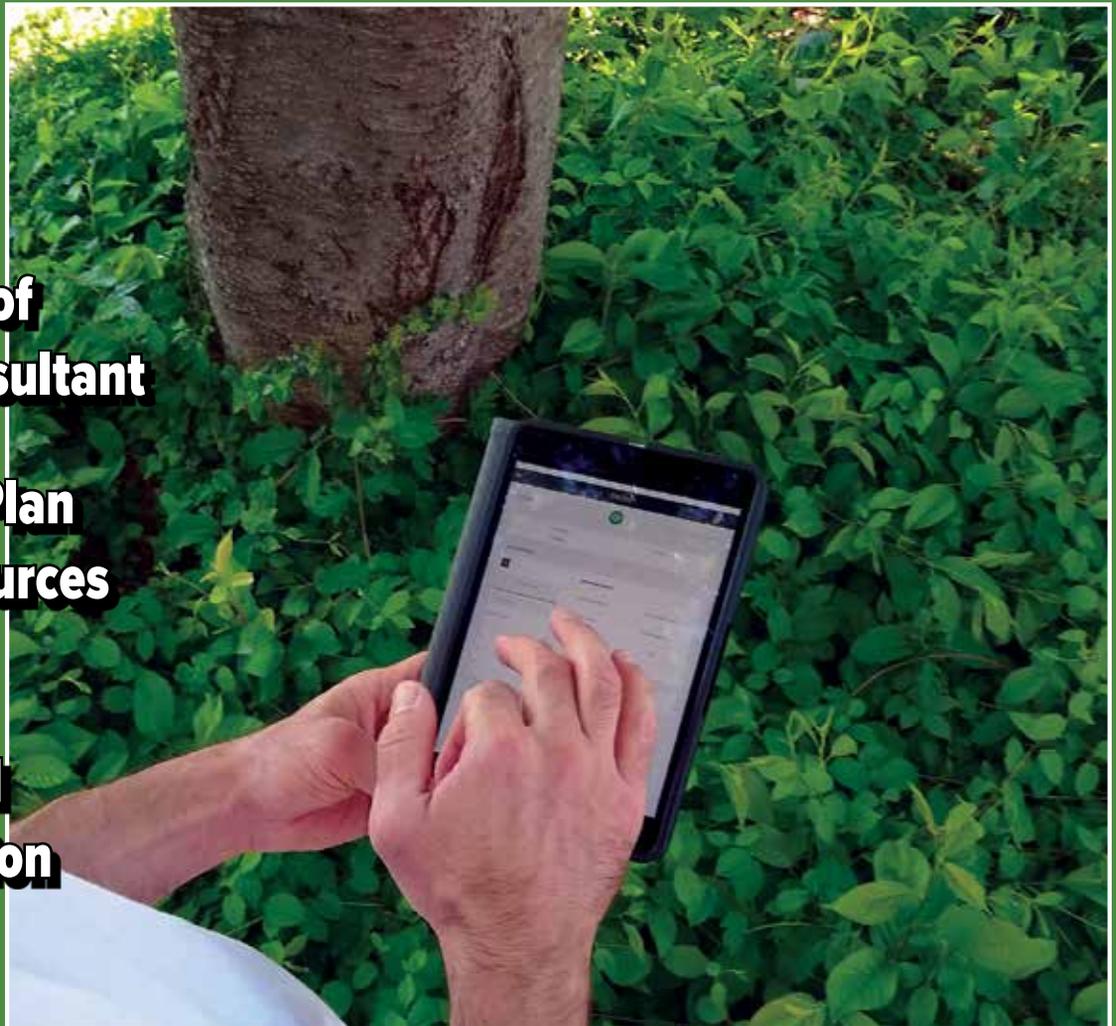
MANAGEMENT PLANS MADE EASIER

Create Your Own Plan

Advantages of Hiring a Consultant

Match Your Plan to Your Resources

Tools for Mapping and Data Collection



NEXT ISSUE . . . Forest Owners' Wildfire Stories

This magazine is a benefit of membership in your family forestry association. Contact the officers listed on page 5 for membership details.

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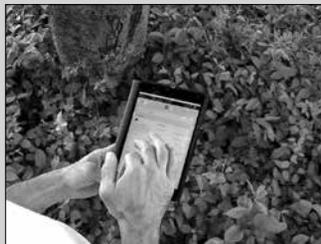
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A myriad of hand tools and digital tools, like Plot Hound for recording your field measurements, can improve the quality of data and mapping for a forest stewardship plan. Photo courtesy: NCX

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Other than general editing, the articles appearing in this publication have not been peer reviewed for technical accuracy. The individual authors are primarily responsible for the content and opinions expressed herein.

There is an incredible amount of helpful information available on the Web, in publications, from natural resource professionals and from other family forestland owners. One website will be of special interest to those landowners who are writing a management plan for their forestland with wetlands in the mix.

SEH is an employee-owned engineering, architectural, environmental and planning company that helps government, industrial and commercial clients find answers to complex challenges. Did you know the wetlands are not always wet? Defining a boundary around your wetland might not be straightforward. SEH has an in-depth tutorial on delineating wetlands at: <https://www.sehinc.com/news/watch-and-learn-how-do-wetland-delineation>.

PRESIDENT'S MESSAGE



J. FRANK MORADO



Management Plans and One Landowner's Experience

The key word in this issue's theme is "plan" and it should begin prior to or shortly after purchasing forestland. Embedded in the plan concept is acknowledgement that education is a key element in developing and implementing an effective management plan. When my wife and I began looking for property, we had no preconceived notions other than wanting a minimum of five acres. When we purchased our property, the real estate agent advised us of the "forestland exemption" but the notion of a management plan was not immediate.

As we became familiar with our property, we quickly realized that the work was just beginning. Even as novices, we noticed that our forest was overstocked, and it possessed considerable fuel loads. A short while later, we received a postcard from professional forester Russ Hegedus of Idaho Forest Group, and we requested a visit. During Russ's first visit, he asked us about our vision for the property and listened before asking a series of questions. He was patient with us, never looking at his watch while we had his undivided attention. After a couple more visits, Russ submitted a management plan for our review per our preferred goals. Shortly afterwards we became aware of forestry classes offered by Chris Schnepf of the University of Idaho Kootenai County Extension Office. We participated in several classes and eventually became Idaho Master Forest Stewards. We also learned about the USDA Natural Resources Conservation Service (NRCS)

and Idaho Department of Lands cost-sharing programs. We applied and received a precommercial thinning grant through NRCS. All along our property improvement journey we have encountered and continue to meet numerous helpful foresters, biologists and education specialists. We also became aware of programs designed to assist forestland owners, such as the American Forest Foundation (American Tree Farm System, My Land Plan, Landscape Management Plan), the cooperative Forest*A*Syst, USDA Web Soil Survey and the USGS Gap Analysis Project to name a few.

Such was the nature of our forestry education journey; but another path exists which is equally important in developing and executing an effective management plan. For example, if a property owner favors a "shotgun" approach to learning, it can begin or be augmented by participation in local conferences or forest field days offered by forestry associations (e.g., Idaho Forest Owners Association) and regional university forestry extension (University of Idaho and Washington State University). Events such as forest owner field days or the recently convened Family Forest Owners & Managers Conference offer the opportunity to meet and interact with professional foresters, wildlife and forestry educators, and state and federal agency experts. In addition, such meetings offer the opportunity to learn about current forestry topics, such as fire policies and potential legal issues facing landowners.

The general point is that many resources are available, regardless of whether the landowner develops their own management plan or reaches out to the many available experts. In both instances, the availability of internet programs and ease of expert contact, makes creation of a management plan relatively easy; the more difficult and time-consuming part is implementation. ■



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PRESIDENT'S MESSAGE



KEN NYGREN



Easier Planning with Your Association Contacts

Thank you, Anne Maloney, for your dedicated years of service to woodland owners across the Northwest. Your gracious approach to herding us association presidents to meet deadlines is a tribute to your patience. Under your capable stewardship, *Northwest Woodlands* magazine has become a treasured asset to the woodland family community. You will be missed.

In my twenty-six-year military career, the acronym BLUF was our mantra. It means "Bottom Line Up Front" and is a reference to a style of writing where the most important message of the body of writing is stated simply and plainly at the beginning to ensure it is not lost by the reader buried in scientific details or eloquent verbiage. So, with that in mind...

The first step in writing a management plan is to join your state and local chapter of forest landowner associa-

tion. Let me explain.

A forest stewardship or management plan is a template for organizing information about your property. It articulates your goals for owning it and outlines a plan to achieve those goals. It combines maps, photos and graphics with narratives to build a complete picture of the property, the goals of ownership and the action plan to achieve those goals. The management plan is an important multi-generational tool for the landowner. It creates a long-term vision of owning the property, with an eye to sustain a healthy forest for the next generation. Just as important as building a plan for a desired future forest, the management plan provides a means to record current activities completed on the property and build the management history to inform future planning.

There are many template formats available to choose from, but they all contain basic building blocks. First, define the property in the plan and who

owns it. Then outline the landowner goals and how to achieve them. Next, describe the past management of the property and current conditions on the ground, focusing on both the physical features like streams, soil and terrain, and the biological conditions, like vegetation cover type and condition. Finally, describe the action plan to meet the landowner goals.

The idea of writing a management plan can be daunting. Approach plan writing as a lifelong process. Like learning to walk, developing and writing a plan requires taking the first step and getting better with practice. The first step in writing a plan is seeking out the template that fits your needs and finding the resources (information) to fill out the template. Consulting foresters, Extension agents, and state department of forestry/natural resources personnel all provide excellent advice on writing a plan. But the best source of advice can be found in joining your state's forest landowner's association. Going to local chapter meetings, attending property tours of other landowners, and attending landowner educational events will open doors to resources, help you meet people who have similar experiences to share how they met the challenges, and give you some building blocks for completing your own management plan vision, goals and actions. ■



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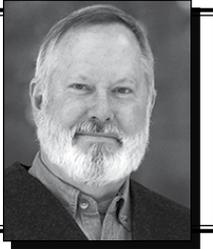
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PRESIDENT'S MESSAGE



ALLEN CHRISMAN



Management Plans Made Simpler

At first glance, the idea of making management plans simpler seems ludicrous! The requirements—for either the American Tree Farm System, stewardship forestry, or to meet the requirements of the Natural Resources and Conservation Service grant programs—seem to be getting more rigorous every year. That is certainly true specifically to meet certification standards or to qualify for grant funding. Either way, the entity that manages certification or grants needs reasonable assurance that the forest owner has done due diligence and accurately portrays current conditions and future plans.

But it is way too easy to get wrapped around the axle in trying to fill in all the blanks in whatever management plan format you are following. Sometimes you want to throw up your hands in despair, intimidated by what seems to be a formidable paperwork task.

Here are some thoughts on how to approach these management plans in a productive manner.

1. Focus on clearly articulating your management objectives. Forest owners often have difficulty in putting to paper what they want from their forest. Take some time and, either with other family members or a trained forester, discuss what you want and how best to describe it. Once you are clear on your objectives, it is much easier to lay out what you would like to do in the future.

2. Describe your current conditions. A trained forester can help. In Montana, the Montana Department of Natural Resources service foresters or a consulting forester can help.

3. Describe what you want your forest to look like in the future and your actions to get there. Again, your service forester or a consulting forester can help. And this is where clarity on your management objectives pays off. With a clear understanding of what you would like out of your property, the forester can help you significantly.

4. Make sure your mapping is good. This doesn't mean hiring a firm to do your mapping. Google Earth has many mapping tools that you can use yourself to capture the information you need.

5. Keep your management plan a living, breathing document. Make sure that you are making annual additions to capture what you have completed, even if it is only notations on the appropriate pages.

Your management plan not only lays out a plan for the future of your forest, but it is an excellent communication tool for others (especially family members) and demonstrates a professional approach to your forest management. Take pride in that accomplishment and look at your management plan as a chance to show off your forest and what you are trying to achieve. ■



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PRESIDENT'S MESSAGE

 *Washington*

DICK ALESCIO



A Plan for Your Future Forest

A forest management plan is an essential item that we must keep updated in order to do what is best for our forests and to maintain forest tax status.

Take a class

If forest ownership is new to you, either through family succession or through a recent purchase, the best thing you can do is to enroll in the forest stewardship class put on by your state land grant university. The class teaches how to write a management plan with a certified forester who signs

off on the plan.

If your family tree farm needs a forest management plan before you can attend the next class, and you are a family successor, talk in detail with your family principal on how to make a management plan. Let them coach you through it for the good of your tree farm assets. If you show that you are interested, the principals will help you. Tree farm owners—make sure your children and family read this article.

Writing your own plan

Get the online criteria from your

state department of natural resources for a forest management plan and schedule a visit from a DNR stewardship forester to assist you at no cost.

Fill in all the blanks as best you can for:

1. Forestland information
 - Property name
 - Legal description(s)
 - Physical address
 - Tax parcel identification(s)
2. Management plan implementation timetable
 - Year
 - Management practice description
 - Location—show stand delineations and numbers on an aerial photo
 - Natural Resource Conservation Service (NRCS) practice code if applicable
3. Landowner objectives for the next 10 years
4. Overview of the property
5. Resource descriptions and management practices by stand number with photographs
 - forest health/wildfire/invasive species
 - soils
 - water quality, riparian habitat, fisheries and wetlands
 - forest inventory and timber/wood products
 - property access, ponds and trails
 - wildlife
 - protection of special resources
 - aesthetics and recreation

Your work will have to be checked and signed by a professional forester. It will be an excellent management plan but may take longer than if you hire a consultant.

Hire a consultant

The final method is to hire a consulting forester to do all this for you. You can hire them yourself or you can contract with NRCS for funding the preparation of the management plan, including finding the consultant to do the work.

Whichever method you choose to develop your plan, it will be a valuable resource in your efforts to improve your forestland. ■



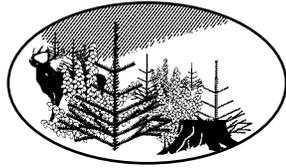
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Longview, WA 360-431-8667

Springfield, OR 541-729-3922



Down on the Tree Farm

AUGUST

✓ In stands susceptible to engraver beetles, schedule cutting of trees over three inches in diameter after August 1 and before January 1 to prevent population buildup in fresh slash.

✓ Talk to your public and private neighbors about the possibility of a landscape-scale habitat enhancement or fuel reduction project when conditions allow. There is strength in numbers!

✓ Maintain your fire prevention diligence until fire season is over in your area. Do you know what your fire danger rating is?

✓ While water levels are low, complete your instream repairs and improvements. Consider installing a guzzler or cistern for wildlife. Clear out and reestablish overgrown springs.

✓ If you're planning a selection harvest, take the time to paint either the leave trees or the take trees. Or, with a reliable logger, develop clear logger-select guidelines and monitor the work as you go.

✓ Take steps to control noxious and invasive weeds. Consider integrated pest management techniques that might work as well as pesticides. Don't forget your personal protective equipment!

SEPTEMBER

✓ Invite a logger, forester or fire fighter to survey and assess your roads for access, repair and maintenance needs. Look at the entire haul route(s) and assure that you have road use permits in place.

✓ Cruise the timber you plan to harvest or have a professional forester do it. Having a good estimate of volume and value helps you market the logs.

✓ While you're cruising, take some core samples to see how your trees are growing. Do a few calculations to assure yourself that your efforts are paying off with accumulated growth, improved vigor and overall good forest health.

✓ Students are back in school and it's an opportune time to host or participate in a forest tour. Help our future forestland owners learn about natural resources on site. It will be memorable!

✓ Check your management plan for next year. Discuss upcoming project opportunities with a consultant or agency representative.

OCTOBER

✓ Begin your road maintenance and improvement projects after some moisture

has reduced the potential for dust and the road surface is workable.

✓ The end of fire season is often an appropriate time for burning slash or prescribed burning. Use of fire requires planning and usually a permit or notification. The burn "window" is sometimes small, so be well-prepared to begin when conditions are right.

✓ Develop your tree planting contract or agreement and hire an experienced contractor. For long-term stand health, assure your seedling source is appropriate and they are planted correctly.

✓ Find out when and where to apply for cost-share incentives for next year's projects.

✓ When you're pleased with your project results, give your forester, logger, agency representative or hired hand kudos for a job well done.

FOR MORE INFORMATION...

check out these favorite websites and publications:

- www.oregon.gov/ODF/ForestBenefits/Pages/ForestHealth.aspx (I&D fact sheets)
- www.dnr.wa.gov/publications/rp_fire_ifpl2.pdf (Fire danger rating system)
- www.oregon.gov/ODF/Fire/Pages/FirePrevention.aspx (Oregon fire prevention requirements)
- www.dnr.wa.gov/ifpl (Washington fire prevention requirements)
- www.idl.idaho.gov/fire (Idaho fire prevention requirements)
- dnrc.mt.gov/divisions/forestry/fire-and-aviation/fire-prevention-and-preparedness (Montana fire prevention requirements)
- www.nrcs.usda.gov/Internet/FSE_DOCUMENTS/nrcs144p2_042076.pdf (wild-life watering)
- www.fs.fed.us/foresthealth/protecting-forest/integrated-pest-management/
- catalog.extension.oregonstate.edu/pnw641 (forest road management)
- knowyourforest.org/sites/default/files/documents/Measuring_timber_products.pdf
- www.knowyourforest.org/sites/default/files/documents/em9047.pdf (maximize revenue)
- https://www.nrcs.usda.gov/wps/PA_NRCSConsumption/download?cid=nrcse-prd1671272&ext=pdf (developing a prescribed fire burn plan)
- knowyourforest.org/sites/default/files/documents/ec1192.pdf (sample contracts)
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The Value of a Forest Stewardship Plan

By **KEVIN ZOBRIST**

Depending on the purpose and context of the plan, forest plans are known by several names, including forest stewardship plans, forest management plans and timber management plans. While there are some nuances between these different terms, the concept is essentially the same: a written document that articulates the landowner's objectives, describes current resource conditions and identifies management steps to achieve the landowner's objectives given the current conditions. For the purposes of this article, a forest plan will refer to a forest stewardship plan prepared in accordance with the USDA Forest Service's Forest Stewardship Program National Standards and Guidelines.



A forest stewardship plan should include the following basic elements:

1. a description of your specific ownership objectives, such as maintenance of forest health, provision of wildlife habitat, aesthetic enjoyment, privacy, periodic income, or any combination of these and other objectives
2. a general description of your property that could include things like location, acreage, geographic features, history, topography, climate and surrounding land uses
3. an assessment of the specific resources on your property, including forest health, timber, wildlife, water,



Stewardship Forest and forest certification signs indicate third-party recognition of a well-managed forest.

soils, invasive species, fire, threatened and endangered species, cultural resources and special sites, biodiversity, aesthetics, agroforestry and special forest products, range, recreation opportunities, carbon sequestration and climate resilience, estate or legacy planning and forests of recognized importance (FORI)

4. management recommendations relative to meeting your objectives and protecting and enhancing the resources on your property
5. a timeline for executing activities identified in the management recommendations
6. property maps
7. space for periodic updates and adaptive management considerations

Benefits of a forest stewardship plan

A written document is not required to be a good forest steward, and there are many outstanding landowners who have never created a formal plan. A written document is also not going to improve your stewardship in and of itself. However, the process of creating a written plan can significantly enhance the way you steward your property. Writing is a powerful activity that

organizes, synthesizes and cements concepts in your mind in a unique way. The process of writing a forest stewardship plan allows you to bring together all that you know about your property and look at it in a new and integrated way that considers the forest in the context of both space (the landscape) and time. Even the most seasoned forest owner can learn (or re-learn) something important in this process and gain a fresh perspective that sharpens skills and leads to improved stewardship.

Below are several other key benefits to putting a plan down on paper.

A management tool

The most basic function of a forest stewardship plan is as a management tool for you as a landowner. A plan helps you solidify your objectives and set the direction you want to go with your property. It provides a road map for achieving your goals and maximizing your enjoyment of your forest. It helps you monitor your progress and stay on track, and it provides a clear outline of what should be done when and where, which can reduce the stress and anxiety that sometimes comes with owning a complex piece of property.



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Plus, research indicates that written goals are more likely to be achieved.

Communication

A forest stewardship plan facilitates communication of your objectives, intentions and management activities. This can help you engage with family members and neighbors about what you are accomplishing on your property. It can also be an invaluable guide for heirs who will someday (and sometimes quite suddenly and unexpectedly) take ownership of the property. In addition, you may find a written plan useful when working with a natural resource agency or forestry professionals, as it will help them to better understand your goals, your values and the unique aspects of your property.

Recognition

Outside recognition of your stewardship efforts is enjoyable and rewarding. An approved forest stewardship plan that meets the Forest Stewardship Program National Standards and Guidelines will allow you to display the coveted “Stewardship Forest” sign. Contact your state’s natural resources agency (Idaho Department of Lands, Montana Department of Natural Resources and Conservation, Oregon Department of Forestry or Washington Department of Natural Resources) to learn more about the process of getting an approved plan and a stewardship sign.

A stewardship plan can also make you eligible to be a certified forest, either through the American Tree Farm System (ATFS), the Forest Stewardship Council (FSC) or both. This gives you the opportunity to display additional signs that will generate positive recognition of your property and in some cases allow you to sell your wood for a premium price or gain special market access.

Cost share eligibility

You may find that some of your goals for your property are prohibitively expensive, such as replacing an undersized culvert, restoring an area that is suffering from invasive weeds or poor past management, dealing with a forest

health issue, improving water quality or reducing wildfire risk. Federal or state cost-share programs may be available to help with the expense of stewardship and conservation activities, such as the Environmental Quality Incentives Program (EQIP) or hazardous fuels reduction programs. Depending on the program, a stewardship plan may either be required or greatly facilitate the application and approval process.

Lower property taxes

In some states, including Washington, a written forest plan may be required to enroll in a preferential property tax program for forestland.

Getting a plan together

There are a variety of resources available to help you get a written forest stewardship plan together, including landowner trainings, consulting foresters, public agency staff, and cost share assistance. The rest of this issue will talk about the different options avail-

able, the pros and cons of a personally versus professionally prepared plan, and some great tools to help you get started with the planning process. ■

Acknowledgement: The material in this article was adapted from Washington State University Extension Fact Sheet FS060E.

KEVIN ZOBRIST is a professor with Washington State University and a Certified Forester. He coordinates the Extension forestry program in the Puget Sound area, working with people who own forested property. Kevin has two forestry degrees from the University of Washington. His research interests include forestry education and outreach methodology, using technology in forestry education, forest owner demographics, forest health and ecology and native trees. He is based in Snohomish County and is the author of the book *Native Trees of Western Washington*. Kevin can be reached at kevin.zobrist@wsu.edu.



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Who Will Write Your Plan?

By **DIANE PARTRIDGE**

Now that you have decided to develop a management plan for your forestland, do you want to hire a forest consultant to write it, or write it yourself? You could craft a “hybrid” where you write part of it and hire a consultant for some of the more technical parts.



This is a unique decision for each individual landowner and depends on several different factors.

What is the purpose of the plan?

A “tax plan” is written to meet the requirements of a plan for Designated Forestland, which is required for most counties in most states to receive reduced property taxes for growing

and harvesting forest tree species. It is probably best to hire a consultant to write this plan to ensure it is done in time for the tax cycle, by December 31 for the coming tax year. Some counties require this plan to be written by a forester with a four-year degree. Most counties and states will accept a “One Plan” or integrated management plan as a tax plan, but not vice versa.

A One Plan, stewardship or integrated management plan is a more complex plan for potential cost-share for on-the-ground forest projects, or to meet several goals, such as Tree Farm Certification and Forest Stewardship Program enrollment. The landowner may want to be more involved in writing the plan. There may be opportunities for a combination, where a landowner hires a consultant to provide some of the more technical components of the plan, such as a forest inventory, while

the landowner develops the remainder of the plan. How to do this should be a conversation between the consultant and landowner.

Each state provides a template online for a plan that meets the combined purposes of Tree Farm, Forest Stewardship Program and Natural Resource Conservation Service (NRCS) forest management plan. Development of the plan may be eligible for cost-share assistance, provided an application is submitted and approved prior to the plan being written. If the plan is to be cost-shared using the Environmental Quality Improvement Program (EQIP), a consultant qualified and certified by the NRCS must write the plan. Some states, such as Washington and Oregon, have separate programs using state funding that can help pay the cost for a consultant to write the plan.

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management plan templates may be found in the table below, listed by state. Again, a single plan written with these templates may cover multiple needs for Tree Farm, Forest Stewardship, NRCS EQIP cost-share projects and conservation easements.

A cruise or timber appraisal for a timber sale, to establish “basis” for the values attributed to the timber and property for tax purposes, or for property sale or inheritance values, should be done by a qualified forest consultant. This cruise or appraisal may be included in the appendix of the One Plan or integrated plan, but it is not

necessary nor considered cost-sharable on its own.

When is the plan needed?

A plan that is cost-shared through EQIP with NRCS (or with the state) must first be applied for, then approved for funding, which may take up to a year from application. Then the approved consultant must have time to write it.

A tax plan will need to be completed and submitted to the county with an application for designated forestland by December 31 for the coming tax year.

A One Plan or integrated forest management plan is needed for on-the-

ground project work done under EQIP cost-sharing, such as tree planting,

—Continued on next page—



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State	Forestry Assistance website	Stewardship Forester locator	Forest Management Plan Stewardship Plan Template	Cost Share	Extension Workshops, Webinars and Online Info
Washington Department of Natural Resources	https://www.dnr.wa.gov/cost-share	Forest Health Assistance for Small Forest Landowners WA - DNR Scroll down for map	https://www.dnr.wa.gov/publications/fp_sflo_fs_intfmgmtgdlns.pdf	EQIP also Eastern WA DNR https://www.dnr.wa.gov/cost-share	https://forestry.wsu.edu/
Oregon Department of Forestry (ODF)	Oregon Department of Forestry : Helping landowners : Working forests : State of Oregon	Oregon Department of Forestry : Find a forester : Working forests : State of Oregon	Templates – Oregon Forest Management Planning (oregonstate.edu)	EQIP also ODF 75% ForestStewardshipProgramCostShareApplication.pdf (oregon.gov)	https://www.oregonstate.edu/forestry-and-natural-resources https://blogs.oregonstate.edu/forestplanning/
Idaho Department of Lands (IDL)	Forest Stewardship Program - Department of Lands (idaho.gov)	Private Forestry Specialist Finder - Department of Lands (idaho.gov)	idaho-one-plan-template-nov2016.docx (live.com)	EQIP	https://www.uidaho.edu/extension/forestry/programs
Montana Department of Natural Resources & Conservation	http://dnrc.mt.gov/divisions/forestry/forestry-assistance/forest-stewardship/resources-for-landowners	Find Your Local Service Forester — Montana DNRC (mt.gov)	https://forestry.msueextension.org/forms-to-download/index.html	EQIP	Forest Stewardship Program - Forest Stewardship Program Montana State University (msueextension.org)

SOURCE: COMPILED FROM THE WEB BY DIANE PARTIDGE

forest stand improvement or shaded fuel breaks. These potential EQIP cost-share projects must be applied for and approved prior to beginning work. Usually there is one cut-off date per year for EQIP funding in the fall. A plan would need to be completed by this date. Existing plans may need to be updated.

Landowner time, interest and availability

Each state has quite a bit of information available to help interested landowners write their own plans, with coaching. There are workshops, trainings, coached plan-writing programs and other opportunities for landowners with the interest and time to take the workshops and develop their own plan. These programs include at least one visit with a qualified forester to help the landowner recognize resources and to approve the plan.

In general, the state's university Extension service will provide group workshops, webinars and field trips. The state's natural resource department will provide one-on-one assistance by stewardship or service foresters to landowners writing their own plans.

The more a landowner and their family are involved in developing their own plan, the more likely they will use it as an active plan, adapting it over time to changing conditions. This is the

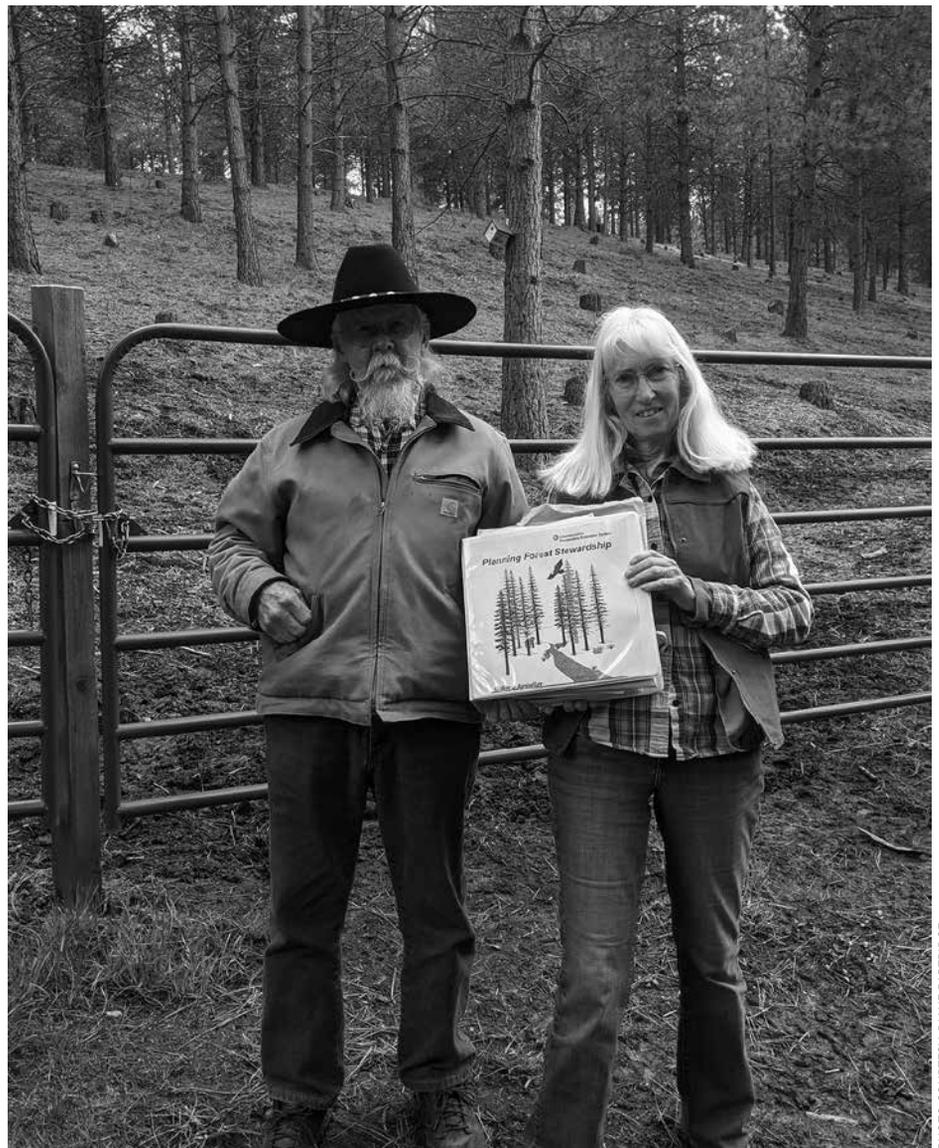


PHOTO COURTESY: DIANE PARTIDGE

Debbie and Sam Duncan of Moscow, Idaho, wrote their forest stewardship management plan in 1991 while going through Extension classes at the University of Idaho. Their plan helped fund the adjacent thinning and fuelbreak in 2015.

true value of the plan. Even if a consultant is hired to write a plan, the landowner should be involved during plan development, especially when defining their goals and action plan. The consultant and the landowner need to develop a good partnership for a quality plan; find a consultant who communicates well with you.

Absentee landowners (those who do not live close by) may have more difficulty scheduling enough time to take workshops, take inventory and develop the plan. Since a lot of background in-

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formation is available online, a hybrid with the landowner doing part and the consultant the rest may work well.

Cost

If you want a consultant to write your plan, ask for an estimated cost. If you write the plan yourself, the out-of-pocket cost may be lower, but do not forget to value your time. A qualified plan may be eligible for cost-share through NRCS EQIP or a state program (in Washington and Oregon), if it is approved for funding prior to writing it and a qualified consultant prepares it.

Recommended steps

1. Determine which type of plan you need and want.
2. Explore links in the table to find help available to write your own or cost-share a plan.
3. Determine if you want to hire a consultant to write the plan, write it yourself with coaching, or write part of it yourself and have a consultant do the rest.
4. Contact your local stewardship or service forester (state employee working in the stewardship program)

for coaching, program information and referral lists.

5. If you want a consultant to write your plan, find a consultant. Your local stewardship forester will have a list. You can also ask local people, including other landowners, for recommendations.

6. If you want to apply for cost-share for a consultant to write your plan, apply at your local NRCS office or the state if you are in Oregon or Washington. You must use an NRCS-approved consultant for a cost-shared plan in EQIP.

7. If you want to write your plan yourself, find the scheduled workshops for your area and sign up. Follow their recommendations.

8. There are quite a few helpful pages on each state's website. Explore these as your plan is developed.

9. Developing a good forest management plan is a great way to learn about your forested property, explore options

for management and involve your family with their forest.

If you are confused or uncertain, talk to your local state agency service forester, Extension forester, master forest steward or trusted consulting forester. Any of these people will be happy to discuss details of your situation and offer direction for you. ■

DIANE PARTRIDGE grew up near Moscow Mountain in Idaho. She did summer work for the Bureau of Land Management, U.S. Forest Service and Weyerhaeuser Company while earning a B.S. in forest management from University of Washington. Diane worked six years in forest management and 26 years in service forestry for Oregon Department of Forestry. She is currently working as a private forestry specialist with Idaho Department of Lands in Coeur d'Alene. Diane can be reached at 208-769-1557 or dpartridge@idl.idaho.gov.

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Forest Plans: Seeing Your Forest Versus Measuring It

By **PETER KOLB**

People own forests for a variety of reasons, which can vary significantly based on how much land is owned and where. Numerous surveys and studies show that the smaller the acreage, the higher the ranking placed on the forest's appearance, aesthetic perception, recreational uses and wildlife habitat, and the lower the ranking (in priority, not importance) for annual or periodic forest-generated income. As acreage increases, usually so does the priority of forest-generated income. This makes a lot of sense when the cost of owning land is considered, which includes the purchase price as well as the costs associated with land maintenance and property taxes. At some point, land should contribute to income to remain affordable to own, aside from simply being a long-term investment. In addition, the larger the forested acreage, the more practical and



financially feasible it is to manage trees and other associated assets as a source of income. So how do programs designed to help forestland owners, such as Forest Stewardship and Tree Farm, provide for the disparity of values and priorities between small and large acreage landowners?

Aside from minimum and maximum acreage specifications, such as Tree Farm's 10-to-10,000-acre limit, forest planning programs, plan templates and certification requirements do not offer different plans or planning processes for different size ownerships. Yet, how landowners approach and utilize forest plan templates and management planning processes might differ.

Forest plan and certification templates tend to focus on the elements that a consortium of interest groups and academics (e.g., Montreal Processes) consider important and needed to provide for sustainable forests and all the ecosystem services they provide. The list of required elements that need to be accounted for seems to grow every year, with some of the latest including

“forested areas of exceptional conservation value,” and most likely will soon include climate change elements, such as carbon sequestration. Acreage size typically factors into these planning processes through the number and size of management units a landowner may define for their lands, and the availability of markets for the products their forests grow. Across Montana for example, it is not uncommon for landowners with less than 100 acres to have two management units, the fire exclusion zone around their house, and the rest of their forest. Larger acreages commonly have more management units based on land position, parcel location, tree species and age classes, grazing potential, wildlife habitat and access.

For a larger acreage, the values for wildlife and aesthetics are like those of smaller acreages, however, management actions need to make an impact appropriate to the scale and diversity of issues found within the forest. Whereas a landowner with smaller acreage might achieve multiple goals by harvesting a load of logs by themselves, this level of activity would not make a dent in the condition of a larger forest ownership. We have seen multiple situations where a landowner used a stewardship workshop to develop a plan that included extensive thinning for fire hazard reduction, and pretty much thought they would accomplish



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A forest management plan helps communicate a vision for your forest and guides the business of managing your land. Management plans demonstrate your commitment to the resource and are a gateway to cost-share programs and sustainable forest management certification.



Tree growth rates

Large tree averages (based on 3 or more trees sampled per species)

Species				Species			
DBH				DBH			
Age				Age			
Rings/last 1 inch				Rings/last 1 inch			
Average DBH				Average DBH			
Average Age				Average Age			
Average total increment (1/2 DBH/Age)				Average total increment (1/2 DBH/Age)			
Species				Species			
DBH				DBH			
Age				Age			
Rings/last 1 inch				Rings/last 1 inch			
Average DBH				Average DBH			
Average Age				Average Age			
Average total increment (1/2 DBH/Age)				Average total increment (1/2 DBH/Age)			

SOURCE: PETER KOLOB

Figure 1. A quantitative form for recording and measuring tree growth rates.

this on their own. Five years and 10 acres of hard labor later they admitted they needed help. Many landowners with intermediate (20-100 acres) and larger (100+ acres) ownerships eventually realize that hiring a consultant and/or logging contractor is the only way to get the work done in a reasonable time and with sound financial results.

Likewise, treating larger acreages efficiently often requires mechanization. The difference in cost/income ratio of hauling a couple of loads of logs to a mill versus a couple hundred, warrants the increased scale of the operation. How a forest plan is developed and then implemented over the next 5, 10, 20 or 40 years will depend a lot on who is doing the work and across how many acres. And the scale of the operation can warrant different approaches to both creating and implementing a forest plan.

Landowners who want to learn more about their forest usually find a structured approach very helpful; at least those who attend workshops on creating a forest plan do. Knowledge that they desire includes which species are growing, how trees are growing, tree value both ecologically and financially, the risks each tree species faces, associated understory, wildlife habitat and overall measures of forest health. To meet these goals a forest inventory is an important task for two reasons.

First, it is the best tool for any land-

owner to objectively learn about their forest. Locating and measuring stratified or random plots within a forest takes a person to places on their land that they do not typically visit because access may be hard or inconvenient. Many landowners who have participated in a stewardship workshop have offered feedback that they discovered trees and portions of their land they never knew they had, even if they only owned 40 acres. An inventory also gives landowners a measure of the potential volume, growth (see Figure 1) and value of the trees in their forest.

Second, the inventory is the starting

point for examining if a landowner's objectives are realistic for the forest they own. Some have learned that they have sufficient trees of merchantable quality that are too crowded and growing poorly for the site, and they can earn some income and improve their forest conditions by thinning. Others have learned that commercially valuable trees do not exist on their property and applying thinning treatments on their own is more work than they want. Applying for cost-share grants will be the best mechanism to reduce wildfire risks. Most landowners find a combination of the two scenarios and they need to establish priorities for a long-term strategy that optimizes their time, resources, costs and incomes.

The establishment of an initial forest plan that includes an inventory of property lines, measured trees, understory vegetation, wildlife habitat, water and access that is based on measured data is the key to starting the process of managing a forest. It is also essential for applying for any cost-share program, or in many cases, provides the basis for hiring a contractor to provide specific services. Measured data, that is recorded and analyzed using accepted procedures, is called a "quantitative" analysis. Any person who has forestry

—Continued on next page—



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training can look at the plan and inventory and gain an instant perspective of the kind of forest on the property, and what the possibilities and risks to the future forest will be.

Once an initial forest plan has been developed, how it is implemented can vary a bit, especially among different sized forest acreages. This is also where a certain amount of heartburn starts to occur with assistance programs, such as the forest stewardship program and the Tree Farm system. Helping landowners develop forest management plans is often paid for by federal, state and sometimes industry subsidized programs. The reasoning for helping landowners develop forest plans is that community, industry, state and federal interests are met—all for the good of humanity of course. These include clean water production, wildlife habitat, sustainable wood fiber production, aesthetics, tourism and others.

Across Montana for example, tourism has become one of the top industries, and public perceptions of what might be seen as land abuses are not in the tourism industry's interests, whereas beautiful forests, grizzly bears waiting to pose for photographs, and ample trout to be caught on a fly certainly are. At the same time private forestlands provide 30-50 percent of the annual

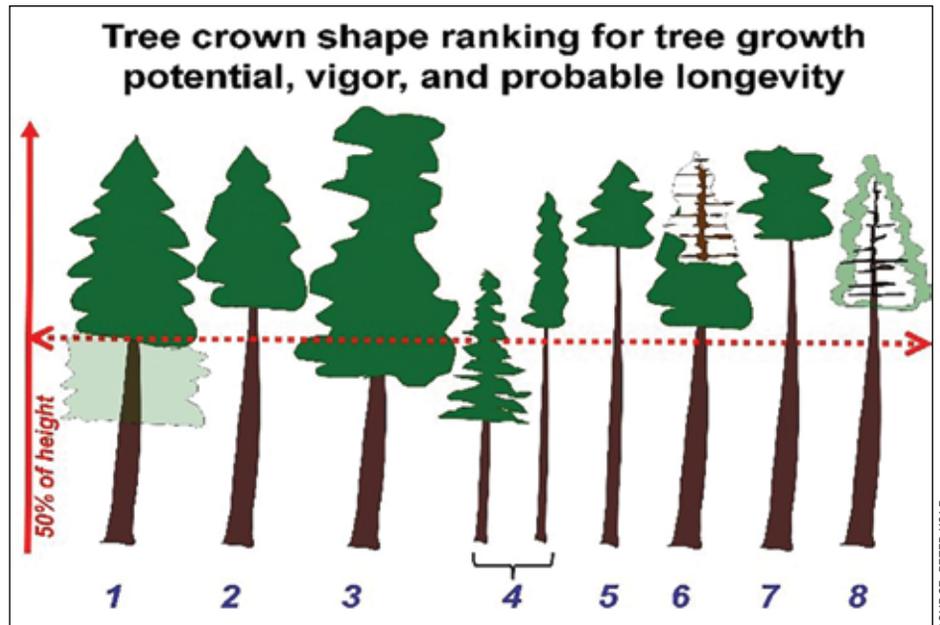


Figure 2. A visual ranking of tree crown shape that is useful for qualitatively assessing overall tree health and growth potential.

commercial harvest and well-managed private forests are critically important to the forest products infrastructure. The entities that provide funding for landowner programs want measurable results, such as acres treated, board feet harvested or fire hazard reduced. To meet modern sustainable forestry standards, mills must also attempt to procure most of their logs from “certified” sustainably managed lands. But are those measures compatible with what the landowner needs and wants?

For smaller acreages, like our own 20 acres, it is possible for my wife and me to monitor just about every tree on our almost daily walks. Such visual observation (see Figure 2), which is called a “qualitative analysis,” is more than adequate for us to maintain a good grasp of what is going on, and to implement and modify our forest plan. And we modify it all the time. As small acreage forestland owners (note to forest policy and planning folks: we are not “small landowners” but small “acreage” landowners) we currently have 9 management units on our 20 acres. When I first showed this to some of our state service foresters, they just rolled their eyes at me and told me I was crazy. But we do have that many special areas of emphasis consistent with small topographic and riparian changes on our land, because we try to first and foremost manage for wildlife microsites, each of which requires a different strategy. Also, with only 20 acres we can micro-manage. Small-scale commercial harvesting of trees on a periodic basis is part of our management plan, and by doing it ourselves we can take a few trees here and a few trees there.

Harvesting is a physical but fun winter activity and a means to achieve multiple goals; the small income achieved



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is not essential to our ownership, but very welcome. Over time, we have merged some management areas and created new ones based on lightning strikes, beetle-killed trees, windthrow and because we just felt like it at the time. Do we record these changes in our initial management plan, you may ask? And here is the heartburn for certification schemes because my answer is a simple, "No." For some, keeping such records is fun; for me, it is not, because my forest plan is in my head, and thus is as dynamic and flexible as I want.

We understand our forest, we enjoy it, work in it and it is a part of what we do; and we enjoy maintaining the relative freedom to ponder our future actions and change our minds. Once our quantitative initial forest plan was created, we have managed qualitatively to meet our needs and respond to the dynamic changes that occur in our (and any) forest that are often beyond our control. Setting up a periodic inventory where we measure plots of trees for growth rates and tree density (quantitative analysis) is not needed.

Unfortunately, when we need to report if we met our goals and on how many acres for our annual 5-year certification review, our style does not neatly fit in any forms or boxes. But as a forest professional, I also think that forest management and certification schemes need to adapt to the different needs of landowners as well, especially the smaller acreage owners. Certification should be able to recognize a landowner's understanding and knowledge of their forest, as an equal to a written plan that in many cases has not been kept up-to-date. As an example, a certified Tree Farm inspector could fill out an evaluation of a landowner's knowledge of their forest as easily as reviewing a written forest management plan and helping a landowner refresh their records. This might be recorded as a qualitative forest plan review.

But why even suggest this? Montana has over 28,000 forestland owners (each with over 10 acres) and yet only about 3000 have gone through the for-

est stewardship forest planning process (accounting for 1.5 million acres) and only about 500 have opted to join Tree Farm for forest certification. Although our workshops fill to capacity every year, we remain close to meeting the annual demand for workshops and offering more would show diminishing returns. I do not believe this is because landowners don't care, but because most feel pretty good about their forest

condition and/or knowledge and prefer to spend their time on other endeavors. Perhaps providing shorter qualitative workshops that allow landowners more of a visual learning experience than a full-blown forest inventory might be a venue we are not committing enough time and effort to in order to provide for better interactions with smaller acreage landowners.

—Continued on page 29—



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Using Apps to Create Management Plan Maps

By **ALICIA CHRISTIANSEN** and **NORMA KLINE**

When looking at a forest management plan template, you'll notice that maps often make up an entire section of a plan. There are many different types of maps that you can incorporate into both the development and maintenance of your management plan. Your specific property and unique management goals will influence both the types of maps you include and the tools you utilize to produce those maps.



Alicia Christiansen



Norma Kline

So how do you go about creating a map? There are a myriad of apps (for your smart phone or tablet) and computer-based mapping tools that can help you create the maps you want to include in your management plan. In this article, we will divide these apps and tools into four categories: apps used to extract data for planning purposes, apps used to create elements of a forest management plan, apps used for data collection and monitoring and general planning tools. We will explore how apps and online tools can be used to enrich your forest management plan.

Apps used to extract data for planning purposes

Before you rush into making maps, take some time to see what information is already out there that you can easily extract and plug into your management plan. There are apps and online map-

ping platforms that can help you obtain information on soils, fire, wildlife, roads, topography, streams and parcel boundaries. This information can be very useful as you plan your future management activities.

Understanding soil types, qualities and limitations is essential for developing a management plan. View soil data and associated information on the online Web Soil Survey, produced by the National Cooperative Soil Survey (NCSS) and operated by the USDA Natural Resource Conservation Service. Zoom into your property and download soil maps and reports using this user-friendly resource. The Soil-Web app is also a great tool. This app is also based on NCSS and provides GPS-based soil information for your current location. This app can be used in the field where cell coverage is available to better understand the soil types and how to optimally use the soil.

County tax lot maps are useful for mapping, property analysis and planning purposes. Some counties have map viewer applications for viewing tax lot information, plats (maps that display legal boundaries) and additional county planning data. Visit your county tax assessor site to see what digital map resources your county provides. For specific information regarding individual tax lots, contact your county assessor.

Online digital data sources include Oregon Explorer, Inside Idaho, Washington Geospatial Open Data, USGS National Map Viewer, USGS Topo-View and CalTopo. Sites such as the National Geographic Trail Maps website allows the user to easily download and print USGS 7.5-minute topographic maps. You can also create an individualized map for your property using the CalTopo website. Select and stack CalTopo's base layers (topography, aerial imagery, geology, fire history), then download the map as a georeferenced PDF that can be used offline in the field on your smart device.

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A wide range of map resources are available in Avenza Maps. While this app is free, the Avenza map store provides a range of both free maps and maps for purchase. Once a map is downloaded to a device, Avenza Maps does not require a cell signal or internet connection to function, making this a very useful feature for many forest management activities.

CalTopo also has an app that is useful in the field. This app can be used for free with cell or internet service and used offline with a paid subscription.

Apps used to create elements of a forest management plan

Once you’ve explored the mapping apps and platforms that can provide you with general information about your forest (like soil, water, topography), you can take the mapping process one step further and start to manipulate the maps to reflect your unique property and goals. For example, using an aerial photo, you can draw boundaries around different stand types in your forest. Using the roads layer, you can draw in your roads and trails on your property. You can also indicate features of significance by dropping a digital pin on locations such as gates, springs or wildlife sites.

You might start by using the basic map app that comes preloaded on your smart phone or tablet. Most of these standard map apps, such as Google Maps and Apple Maps, perform basic functions, such as navigation and saving points of interest. These apps can be very useful tools when you’re looking to extract baseline information about your property, as they allow the user to create, save and label digital pins that indicate features of importance. Pins, or marked locations, are a useful feature as they allow you to



A forester navigating in the woods using a digital mapping app on a tablet and a hand compass.

PHOTO COURTESY: ALICIA CHRISTIANSEN

Maps or CalTopo to help manage your property. Maybe you want to map general locations of trails, roads, property boundaries or harvest unit boundaries to help you better understand the layout and features on your property. Using the “record GPS tracks” feature in Avenza or the “record track” feature

save the location of a point of interest on your property for future reference. You might find pins useful to indicate a spring, gate, landslide, wildlife tree, or other features you come across and want to map on your property.

There are a variety of ways that you can utilize mapping apps like Avenza

in CalTopo, you can record the path that you walk or drive and, as you travel, the GPS will be enabled and record your tracks on the map. For example, while you’re out on your land, you might come across a feature not displayed on an aerial photo, like a recent

—Continued on next page—



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patch of blowdown or insect damage. You can turn on the GPS track feature and walk the boundary of the blowdown patch. Later, you can calculate the area by using the “draw and measure” tool in Avenza or the “polygon” feature in CalTopo to trace your tracks around the blowdown to calculate the total area of the patch. You can store multiple tracks as different layers on a map, allowing you to see all the different features where you traveled on your property. Recording your tracks will also allow you to record total distance and elevation changes while you map out property features.

Another useful tool in Avenza Maps and CalTopo is the ability to draw and measure on the map. You might want to measure the distance between two points if you’re out on your property and wondering how much farther it is to the next ridge, property corner, road or other feature you’re looking for. Using the “measure distance” tool in Avenza or the “distance” tool in CalTopo, you can find out just how far it is to your destination.

Google Earth is another tool that you can use to interface with data collected from mapping apps. It is available for free for both basic and advanced versions. Google Earth allows the user to access satellite and aerial imagery in a



PHOTO COURTESY: NORMA KLINE

Using a digital map on a cell phone.

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Apps used for data collection and monitoring

As you become more comfortable using mapping apps, you may want to explore other apps and features that can help you learn more about your property, monitor conditions and plan for the future. This is where an app that can assist you with a timber cruise, or forest inventory, can be useful.

To perform a forest inventory, an app such as Plot Hound can be a great tool to help you get the job done. This app allows the user to download cruises and plots to their device, navigate to each plot with their phone’s built-in GPS and compass, and enter data collected in the

Gadgets and Gizmos Aplenty: Hitech Data Collection Options for Your Management Plan

By **LAUREN GRAND**

The opportunities are endless when it comes to data collection on your property. You can count, describe or measure anything. Despite how much you love your property, trying to collect data on everything is too big a task and unnecessary. Trying to accomplish it all will likely leave you regretting even having thought of writing a management plan. So where should you start?



Below are some standard resource descriptions that every management plan should include.

A description and map of the:

- forest vegetation (timber) by stand or management unit, including age, size, species composition and stocking
- soils, including their series name, characteristics and relation to forest management
- water resources, such as streams and wetlands and their classifications;

springs and ponds; and riparian habitat condition

- wildlife known to inhabit the property and the habitat elements that are present for desired species, or damage that is caused by undesired species
- existing rocky and dirt roads on your property and adjacent properties
- forest health concerns, including insect, disease or abiotic concerns; wildfire hazard; invasive weed presence
- sensitive, threatened or endangered species; cultural resources and historical sites that require protection
- recreational or educational uses of the property; include a description of any aesthetically important areas

Keep in mind that your management goals can also dictate what data you collect. Hopefully, you've learned in other articles that goals and objectives are the cornerstone of your management plan. Following your goals will provide a framework for what data need to be collected to develop a baseline understanding of the resources you'd like to manage on your property.

Let's look at some examples. One of my management goals is to increase wildlife habitat for pileated woodpeckers. An associated objective with that goal is to have two snags per acre over 21 inches in diameter. So, I need to find out how many snags over 21 inches I have in my forest.

If you expect your forest to provide income, you will find it useful to know the volume of merchantable timber and how fast it is growing. You may also choose to identify the abundance of any nontimber forest products on the property.

So, how do you get the information you need? Through a field inventory. A detailed inventory examines your property for its resources. Conducting an inventory can be time-consuming and hard work, especially if you need lots of information. However, there are many gadgets out there that can help make the work a little easier and more fun for the whole family.

Most timber measurements can be made with a few simple and inexpensive tools. The old standby tools, such as clinometers, increment borers, diameter tapes and Biltmore sticks can get most of the information you'll need for describing your timber resources. See "Tools for Measuring Your Forest" (catalog.extension.oregonstate.edu/ec1129) for detailed descriptions.

Laser rangefinders are becoming more available and if you are planning to measure a lot of distances and tree heights then this tool is for you. Rangefinders use a beam of light to measure distances. Most units designed for forestry also include a digital clinometer allowing you to measure horizontal and slope distances and tree heights. Nicer models will remember multiple measurements, so you can measure total height and height to live crown, or height to dead branches, birds' nests or deformity at the same time. Some units include a setting to recognize a reflec-

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Most of the measurements that might be included in your plan can be taken with tools that have been used by foresters for many years.

as well as surveys of wildlife in the forest. This information, including pictures, can be collected from a single device, then accessed, manipulated, calculated and generated into detailed reports. All information and photography can be accessed and edited later from your computer. These devices have built in GPS so information can also be linked to location data. This allows you to map things more easily for your plan and, in future inventories, navigate to forest plots and develop detailed profiles of specific areas in your forest that open automatically when you arrive.

Data loggers can be very expensive (thousands of dollars), but today's cell phones and tablets can be used as data collectors too. Most now have GPS receivers and there are numerous free or reasonably priced applications that you can download to collect data. There are lots of great mapping applications that

—Continued on next page—

tive target—a handy option for measuring distances in brushy conditions. Laser rangefinders cost \$250 or more depending on the number of features and accuracy.

Global Positioning Systems (GPS) use satellite signals broadcast to a hand-held unit to provide positioning, navigation and timing services. GPS is useful for management planning because it can identify areas of interest in your forest. GPS can keep point location information such as special sites, inventory plot centers, wildlife features or damaged trees. They can track line distances for mapping trails and roads. Or they can identify the perimeter of an area, such as stand boundaries, timber harvest areas and invasive plant management areas. When these features are mapped, you can calculate distances and areas and identify patterns. Hand-held units start at around \$75 for consumer-grade receivers.

Data loggers or collectors are devices that store inventory data in the field, including tree measurements, soil types, land conditions and site quality,

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will be discussed in Christiansen and Kline's article. Other applications you might consider looking into are:

- field guide applications that help you identify plants, soils or other resources by having you take a picture or accessing your location.
- citizen science applications that give general trends of plant and animal ranges, like iNaturalist, or phenology and precipitation data, like Natures Notebook and CoCoRaHS based on your location.
- timber cruising apps that can help you organize your plot locations and data.
- forest measurement tool apps that will help you measure trees if you don't have the equipment.

Light Detection and Ranging (LiDAR) is a remote sensing system that emits pulses of light to measure distances. Previously only used in aircraft, LiDAR is now available on handheld scanners. With each step, this technology simultaneously uses location and mapping information to create 3D models of your forest that can be viewed in real time on a tablet, or later on a computer or in VR goggles. You can collect data on things like tree distances, tree heights, locations and dimensions of down wood, stream widths, road or trail dimensions, fuel

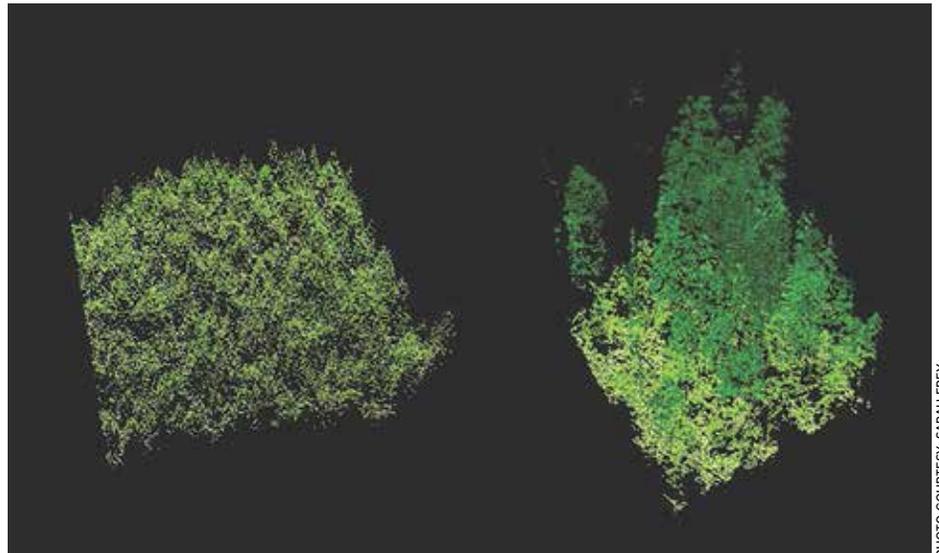


PHOTO COURTESY: SARAH FREY

Points of laser light reveal the differences in structure in a plantation (left) and an old-growth forest, as shown by LiDAR.

loading or other resources related to your goals. These tools are quite pricey but might be accessible through a local university or forestry consultant.

Augmented reality applications can also work on your phone or tablet. Augmented reality allows you to have an experience that enhances your physical location with computer generated inputs. Imagine walking along a trail on your property with your phone and you get to a portion of your property with bear damage. A picture of a black bear pops up on your screen with information on why and how they damage

trees. You scroll to find a map with your physical location outlining the boundary of the damage. It shows you a slide show of the extent of the damage over time. Links are attached with the option to look up more information on how to manage for bear damage. You notice there is a new area of freshly peeled trees, so you edit the boundary on the map and take pictures of what you see. These resources can be an invaluable use of technology to monitor your forest health, habitat and timber operations. It can also be a great opportunity for family members who want to learn more about what is on the property and how it is managed.

Taking pictures and video with a 3D camera can help you monitor your forest from soil to canopy on your computer or in virtual reality (VR) goggles. These cameras enable the perception of depth in images to replicate three dimensions as experienced through our vision. When looking at these images in VR goggles it seems as if you are out standing in your forest. Creating a time lapse of these images can help you monitor areas of concern or how your forest changes over time. 3D images are also a great way to get the kids involved or share your property with family members who live far away. These cameras range in price from a few hundred to a few thousand dollars.

Drones or unmanned aerial vehicles



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are remote-controlled multirotor or fixed-wing aircraft. The uses of this technology are diverse and growing. When equipped with a camera, drones can create inexpensive high resolution aerial maps of your forest. Drones can streamline monitoring by allowing you to see all the corners of your property more easily. The overhead view can help locate the effects of storm damage, insect, disease and invasive species issues, or areas that have high fuel loads. You can also use the cameras to document your resources, including stand or resource boundaries, acreage, tree species and wildlife habitat locations. Take before and after photos of management activities, including a recent thinning or harvest, newly built roads, added ponds or restoration of an oak woodland. Commercial use of a drone requires a license (www.faa.gov/uas).

Aerial photos can also be scaled and used for planning in silvicultural treatments. With a little familiarity and some calculations, you could determine tree height and spacing data that are extremely useful when choosing when to thin and when to cut. The necessary hardware for this level of analysis costs around \$2000. With the addition of small and light multispectral and thermal infrared sensors (around \$500,000), data can be collected about the relative health and environmental conditions that influence the growth of individual trees such as drought, disease and nutrient deficiencies. LiDAR can also be attached to drones allowing remarkably accurate 3D reconstructions of forest scenes that can be used to measure tree dimensions and terrain with a high level of confidence.

Management planning is one of the most important parts of managing and stewarding your land. Knowing what you have is 80 percent of the battle. With the use of these tools, you can make it both an informative and a fun activity that can include the whole family. ■

LAUREN GRAND is an assistant professor (practice) and Lane County Extension forester in the College of Forestry at



PHOTO COURTESY: SHUTTERSTOCK

Drones are becoming more common in forest management and can provide photos of remote areas as well as documentation of forest activities

Oregon State University. As an Extension forester, she teaches landowners and the public about forest ecology, management and planning. She also has a focus on

amphibians and their forested habitats. Lauren can be reached at 541-579-2150 or lauren.grand@oregonstate.edu.

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Articulating Your Goals

Often, the most difficult step in a planning process is defining your goals. Here is an excerpt from the “Oregon Forest Management Planning System Guidelines,” from May 2017. For more information visit: tinyurl.com/ManagementPlanning.

Goals relate to your reasons and interest in owning forestland. They also form the basis for your management plan, which helps to outline how you will achieve them. List the primary goals you have for your forest. Here are some examples to get you started.

- Improve forest health.
- Protect against wildfires.
- Provide and improve wildlife habitat.
- Develop ponds or other water sources.
- Learn about or study nature.
- Establish new tree plantings.
- Enhance tree growth and quality in your forest.
- Provide hunting or fishing.
- Generate income from harvesting timber.
- Generate income from non-timber products.

- Generate income from recreational access and use.
- Restore native habitats.
- Reintroduce or emulate the ecological role of wildfire in the forest.
- Control invasive species.
- Maintain and develop trails for hiking and skiing.
- Develop and maintain trails for off-road recreational vehicle use.
- Improve fish habitat, including streamside forests.
- Retain my land as a forest.
- Explore opportunities to integrate agriculture and range use with forest management.
- Provide benefits of trees to the environment.
- Maintain a secluded place to live.
- Pass property on to heirs.
- Others...

For each goal, consider the following.

- Provide a general description, including your reasons for including it in the plan.
 - Set the priority of each goal.
 - Outline the general management actions necessary to achieve each goal.
 - Describe how you will measure whether you have achieved the goal.
- You might outline some specific objectives, or benchmarks, to attain on the way to meeting your goal. Include how you are monitoring resource conditions and how well your actions worked.

Think of this as a preliminary list of what you would like to do with your property. Your objectives and actions will be further developed as you complete the forest management planning journey. ■

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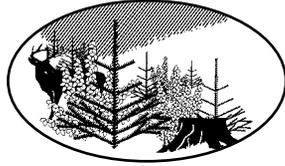
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The Understory

Pest Detectives

By **KARLA SALP**

The Asian giant hornet (*Vespa mandarinia*—also named the “murder hornet” by the media) can decimate an entire honeybee hive in a matter of hours. It was first detected in North America in September 2019 when specimens were identified and a nest was subsequently found and eradicated in Nanaimo, British Columbia on Vancouver Island. Not long after, a Blaine, Washington, resident found a dead Asian giant hornet on his porch and reported it to the Washington State Department of Agriculture (WSDA) in December 2019. In 2020, WSDA found and eradicated the first Asian giant hornet nest in the United States in a rural location east of Blaine. In 2021, WSDA found and eradicated three more nests in the same area.



While Asian giant hornets are not a pest of trees, forest owners are in a unique position to help detect and eradicate this invasive insect because of the hornet’s preferred habitat: forested areas. In fact, while the scientific literature suggests that the hornets are cavity dwellers and normally nest in the ground, every nest in Washington has been found inside decaying alder trees.

Forest owners in Washington are invited to participate in WSDA’s citizen scientist trapping program. The program involves hanging one or more homemade traps beginning in July; high on the edge of a forested area is best. The traps are then checked once or twice (depending on which bait is used) through November. There are no commercially available Asian giant hornet traps—standard wasp/hornet traps’ entrances are too small for these hornets that can reach up to 2 inches in length.

Setting and monitoring traps is helpful but watching for and reporting Asian giant hornet sightings with a photograph is just as beneficial—if not more so. More than half of WSDA’s confirmed detections over the last 2 years came directly or indirectly from public sightings and reports. Sightings should be reported to the state department of agriculture for the state in which the hornet was spotted.

So far, the hornet seems to be spreading quite slowly, thanks in large part to efforts from the public to watch for and report suspected sightings as well as WSDA’s innovative approaches to locating and eradicating nests. Whatcom



PHOTO COURTESY: WASHINGTON STATE DEPARTMENT OF AGRICULTURE

The Asian giant hornet can grow up to 2 inches long.

County remains the only county in the country with confirmed live hornet sightings.

WSDA’s objective is to eradicate this insect before it can establish in the U.S. To consider the insect eradicated, WSDA must have three years of no detections.

Visit agr.wa.gov/hornets for more information about Asian giant hornets, participating in trapping or reporting suspected sightings in Washington. ■

KARLA SALP is a public engagement specialist with the Washington State Department of Agriculture. She can be reached at 360-480-5397 or KSalp@agr.wa.gov.

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TreeSmarts: Answers to Your Tax Planning Questions

TreeSmarts: Answers to Your Tax Planning Questions appears every other issue in Northwest Woodlands. The column is edited by John P. Johnston, a partner, CPA, and CMA with Bancroft Buckley Johnston & Serres LLP in Seattle, Washington. He is a member of the AICPA, IMA and WSCPA.

Better Living Through Easements

Who hasn't at least heard of a story involving an easement dispute? I don't know what's worse: the loss of time, money or sleep. But on the bright side, there are some great opportunities to be had with easements, including financial, practical and even altruistic; assuming, that is, that you go about it properly.

Before I go any further, I want to make sure we are all talking about the same concept. A legal easement is a common law nonpossessory right to use the real property of another. Beyond that the topic becomes infinitely confusing and beyond the scope of this article. I am sure most of us dealing in timberland and other real property matters see easements all the time. Most commonly a landowner, whether because there is no alternative, or because it is much more economically feasible, is happy to pay a neighbor a fee for the right to either temporarily or permanently travel over their property.

The taxation of these types of easements can vary due to several factors. First, permanent easements generally give rise to capital gain treatment while temporary easements are often rental income, which is a nice way to free up suspended passive losses and a topic for a different day. But there are some important caveats here. First, for a permanent easement the basis in the affected property is reduced by an amount up to the proceeds received, which reduces the amount of taxable gain as a cost of sale. Consequently, if the cost basis in the affected land is equal to or greater than the proceeds, there is no gain. Second, if a temporary

easement is long enough in duration, it can be deemed a permanent easement. This recharacterization is driven by the facts and circumstances of the situation, but there is no shortage of case law to help provide guidance. Either way, these simple easements can be a very nice way to pocket some extra cash while doing very little in return.

There are two other types of easements I want to briefly explore. The first is a conservation easement. You have probably heard of people selling or donating conservation easements, but let's make sure the maneuver is understood. I have heard real property defined as a bundle of sticks. One stick may represent the right to travel across the dirt. Another may represent the right to develop under and upon the dirt. And even another may represent the right to use the air space above.

Normally, a conservation easement is granted in perpetuity, involves a restriction on development rights and is sold or donated to a local land conservancy/trust. The taxation follows the treatment described above for permanent easements. The tricky part is determining the proper amounts. The IRS scrutinizes these transactions closely, so you are well-advised to use a qualified appraiser, because the key is to determine the fair value of the property immediately before and after the easement. This will drive the determination of the basis of the affected property. In other words, you are trying to determine the basis of the "development stick" out of the entire bundle of sticks. One last creative thought on this topic is that for federal income tax, real

Send in Your Tax Question

Do you have a question that relates to accounting, business, or tax planning? If so, send it to tax expert John Johnston (jjohnston@bbjllp.com) and he will answer it in the next scheduled column.

property is usually defined under state law. So, if a state considers air rights to be real property, is the sale of air rights eligible for an IRC § 1031 transaction? My experience shows that asking five different tax attorneys will get six different answers.

The other type of easement I want to mention involves forest carbon offsets (i.e., carbon credits), which is a topic receiving a great deal of interest these days in the timber community and has a lot of uncertainty and misunderstanding connected with it. The idea is that a landowner agrees to a long-term management plan that is carbon-friendly and receives "carbon credits" in exchange, which they can then sell to third parties. My creative thought on this topic asks, "Is tax triggered when the carbon credit is sold for cash, or when the easement is sold for the carbon credit, which inarguably has value?"

Easements are, in the end, a function of law. My advice is that if you plan to become involved in an easement, whether a simple right to egress, a complicated carbon credit scheme or anywhere in between, get good professional help. If you don't, that argument you have with your neighbor over your shared driveway will be nothing in comparison. ■

Disclaimer: To ensure compliance with requirements imposed by the IRS, any tax advice contained in this communication was not intended or written to be used, and cannot be used, for the purpose of (i) avoiding tax-related penalties that may be imposed on the taxpayer under the Internal Revenue Code or applicable state or local tax law, or (ii) promoting, marketing or recommending to another party any tax-related matter(s) addressed herein.

Forest Plans: Seeing Your Forest Versus Measuring It

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Alternatively, larger acreage and absentee landowners who do not have the capacity to monitor their forest constantly or even periodically might find the quantitative approach much more useful. I was recently out on a ranch in central Montana with the landowner looking at a particular stand of trees and the owner admitted he has not been to that part of his forest in several years. Having a planning process that measures and delineates different stands of trees, their height and growth rates, the soils they were on, wildlife habitat, grazing potential, weeds and other features, as well as a monitoring process that periodically provides data on changes to those stands, is an essential tool for managing land for two reasons. First, it helps landowners understand the assets and their value as they exist across their ownership, and what risks and opportunities there are associated with them now and over time. Second, to work effectively with a consultant and contractor, larger acreage landowners need to be able to keep track of their assets and communicate what work they wish completed and in what timeframe.

Measurable parameters are required to keep track of inventories, silvicultural prescription, and learning what works best for the specific forest microsites of larger ownerships. Larger family farms and ranches also need a successional business plan as these are multigenerational endeavors where long-term investment strategies are essential. This requires knowing how many trees you have, their volume and value, and what you want your management units to look like in the future. Qualitative management, which traditionally has been used on forested acreage of larger ranches across Montana, does not work very well, and often results in haphazard logging whenever timber prices peak or the ranch faces a financial crisis. The current system of forest management plan development

and review not only works well for these landowners, but it can also be very beneficial for working relationships between mills and landowners. ■

PETER KOLB has been the Montana State University Extension forestry specialist since 1997. He conducts research on a variety of forest restoration practices: post wildfire recovery and

the role of salvage and sanitation logging; forest debris treatments and impacts on site ecological processes; climate impacts on forest processes and disturbance; windbreak establishment and maintenance techniques; and family forest ownership trends. Peter can be reached at peter.kolb@mso.umt.edu.

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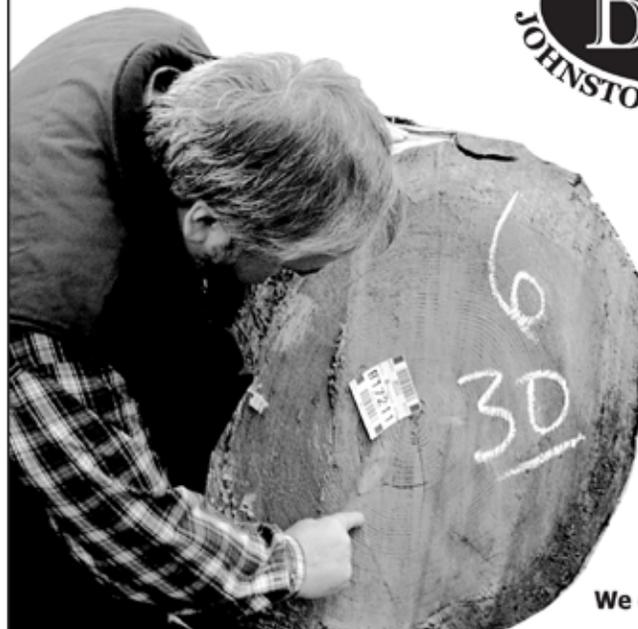
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Twig Tales

Forest Stewardship Planning—A Fishy Tale

By **KEN BEVIS**

Julia Sunshine-Wormcast was weeding her organic cabbage patch, taking a break from jewelry-making, when she called. She and her steady husband, Rock, manage Muddy Bottom farm along the Lower Mudflat River in Compost County, West Cascadia, where they raise yaks, beans and tilapia.



The place is gorgeous—emerald green with lush moss and ferns in a rich forest of cedar, maple, fir and hemlock. The Mudflat holds salmon, and they live near the salt among eagles, bears, osprey, otters, woodpeckers and more. It is idyllic, but very wet.

Eight years ago, I helped develop the Soggy Bottom Stewardship Plan, full of innovation and good forestry. My pager beeped—an emergency call on the FDCNRAFDSP (Forestry Department of Coordinated Natural Resource Agency Forestry Division Forestry Service Programs) hotline. It was Julia.

“Ken, remember the seasonally flooded cedars where we started to raise fast-growing northern tilapia using that agro-fishery-forestry grant?” It was my idea and now they have three steady income streams: trees, yaks and fish.

“Well, nutria moved in and flooded the whole stand. It got too wet for the cedars, and they all died. Now we’ve even got sea lions coming up from the bay lying around eating tilapia. The dogs are afraid to go outside.”

“Hmm. Sounds like basic management issues we can deal with!” I said.

“Well, there’s more. Yesterday that darn Madrone McForrest, the Compost County Assessor, came by. She said since the cedars were dead, and the tilapia aren’t

registered as a legitimate crop, we are in violation of our stewardship plan and subject to a big hunk of back taxes! She’s coming back today. Can you get over here?”

“I’ll be right out,” I uttered incredulously.

Julia greeted me in the road. She glowed with an all-natural wholesome-ness. Butterflies hovered and perched on her. She looked like Mother Nature herself. Rock stood by, tall, smiling, solid and silent.

We went to the swamp, watching tilapia swirl in the water while musing solutions. A silver-gray Lincoln Town Car with the Compost County logo on the door drove up.

“Hello. I am Ms. McForrest. I am here to inspect the removal of significant acreage from forest and changed to tilapia paddy.”

Julia said, “Well, here it is.”

McForrest scowled as fish splashed, and pileated woodpeckers banged overhead on the dead cedars. She flatly stated, “I have done the calculations and based on the lost forest acres, and the fact we have no category in land use for agro-aqua operations of any kind, by continuing this situation you will owe \$250,612.42 in back taxes.”

Julia blanched and tears welled up. “That would break Goopy Bottom farm!” she cried. Rock only grimaced.

My brain was spinning, especially considering the emerging disaster was partly of my making. Wait. In the plan, there is a section on climate change adaptations. Assisted migration of southerly adapted species is a viable strategy. We need something from the south that can grow in water, so the land is forested AND the profitable tilapia project can continue. I had a vision and spoke, “Let’s plant climate-adapted bald cypress. They live down south and have those cool pneumatophores that allow them to live



in standing water. Then the forest is back to forest, and the tilapia crop continues. We can get a climate adaptation grant for assisted migration from the FDCNRAFDSP and hire county crews to come out and plant the trees.”

McForrest visibly lightened. “I like your thinking. I will give you 6 months to implement this solution, and then I can reinspect to see if it is working.”

We got to work. Contact with the Louisiana Department of Forestry and Natural Resource Agency Tilapia-Crawdadd/Bald Cypress Revival Project yielded an immediate answer. “Howdy, ya’ll. I’m Jediaiah Vou Lez Vous. Ya’ll need something?”

That’s how it began. Within weeks, a truck full of young bald cypress arrived. We left most of the cedar snags for the woodpeckers and lowered the level of the water with pumps which allowed crews to plant the bald cypress.

Eight years later, the bald cypress are thriving. The trees are about 30 feet tall and jagged “knees” protrude above water. Tilapia graze in the shade. Swallows live in the snags. It worked.

Julia and Rock kept their preferred tax status and Soggy Bottom Farm is thriving.

“I love the FDCNRAFDSP. You are so bloody awesome!” exclaimed Julia while she wove colorful fabric into a yak’s mane and tail.

Yes! It’s tough being this smart. ■

KEN BEVIS is the statewide stewardship wildlife biologist for the Washington Department of Natural Resources. He is fascinated with all things offbeat and loves to see odd pieces of yard art or beautiful cavity snags on properties he is privileged to visit. Beware, however: anyone he meets who is interesting, eccentric, highly skilled or all of these, could become a model for a *Twig Tales* character! Send me your nominations at ken.bevis@dnr.wa.gov.

Using Apps to Create Management Plan Maps

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create cruise plots, mark important features). Check for free spatial data available from your state geospatial website. Commonly available data includes the Public Land Survey System, topography, transportation, water, vegetation, geology, land ownership and aerial imagery. GIS is used for complex analyses and modeling as well as detailed, efficient mapmaking. While the price tag is often out of reach for small woodland owners, a free open-source GIS like QGIS might be of interest.

It is completely up to you how to integrate digital mapping information into your management plan and process. You could print out the maps and place them in a binder, or create a separate digital file dedicated just to

maps of the property. The point here is that the forest management planning process and organization is flexible. The process for creating a management plan and incorporating your digital maps might look different for everyone, but the important thing is that you have a system that works for you and a forest management plan in place.

To learn more about digital mapping apps and tools, visit the Oregon State University (OSU) Extension *Using Digital Mapping Apps* website at <https://blogs.oregonstate.edu/woodlandmappingapps/>. On this website, you can view a 4-part article series on digital mapping apps and watch the recordings for a 3-part webinar series on digital mapping apps and tools for woodland owners. Also check out the OSU Extension publication *Land Survey and Mapping: An Introduction for Woodland Owners* (PNW 581) for more information. ■

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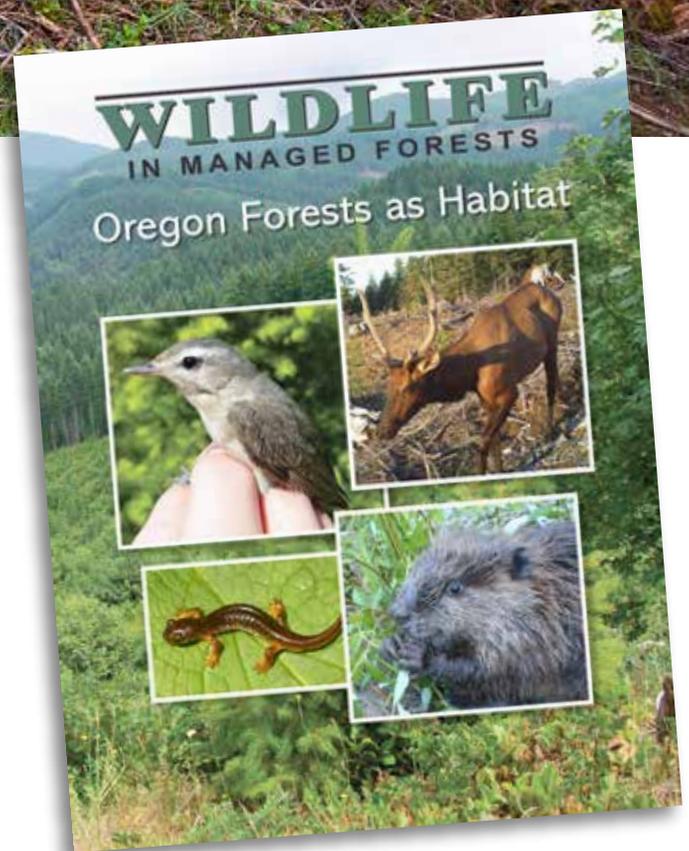


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