The Elements of a Successful Forest Stewardship Plan

Forest stewardship is the management of forest resources in a way that meets the needs of the current owners, but does not adversely affect use by future generations. The Wildlife Management Series of fact sheets provides information on individual wildlife species (game and nongame), basic wildlife management, recreational access, and other topics. Contact your County Extension office for more information on either of these fact sheet series.

Remember, a plan is worthless unless it is implemented. As a forest steward, it is your responsibility to take the necessary steps to care for your woodland. Be an example to others. To learn more about forest management, call your County Extension office for information on educational programs or ask your forester.

Adapted From

Developing a Forest Stewardship Plan: The Key to Forest Management

Forest stewardship is the management of forest resources in a way that meets the needs of the current owners, but does not adversely affect use by future generations. It requires that the owner have a sense of responsibility, know the opportunities, be aware of the consequences of actions, and be guided by objectives. A forest stewardship plan is a working guide that allows the landowner to maximize the wildlife, timber, recreation, aesthetic value, and other benefits of owning woodland. A good plan combines the natural and physiographic characteristics of the woodlot with the interests and objectives of the owner to produce a set of forest management recommendations. This plan, if followed, should transform the forest into one that is enjoyable and productive for the owner and for future generations.

A forest stewardship plan does not need to be a long, complicated document filled with statistics and confusing jargon; the best plans are brief and to the point.

1. landowner objectives for the woodlot;
2. individual maps denoting the property’s location, boundaries, forest stands, and soil types;
3. forest inventory data;
4. descriptions and recommendations for each forest stand; and
5. a chronology of recommendations.

Plans are typically written for a 10- to 15-year period but should be updated about every 5 years. We will follow a sample forest stewardship plan for the Becker farm to illustrate the steps in developing a plan.

Landowner Objectives

There are many reasons for and many benefits to be derived from owning woodland. Most owners value the privacy and aesthetic beauty their forests provide. Many people enjoy bird-watching, hunting, fishing, cross-country skiing, and other forms of forest recreation. Some landowners want an annual supply of firewood for their own use or for some periodic income. The list of potential benefits is long.

No one can develop a forest stewardship plan that is right for you without knowing what benefits you value and what ones are unimportant to you. Management recommendations for a given stand of trees can vary dramatically depending upon the objectives. Priorities provide the framework for developing forest management recommendations. Without them, a forester can write a plan only by making assumptions about your priorities or by imposing his or her own. Bring up goals and objectives early in conversations with the foresters and other natural resources professionals you contact.

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If you are considering harvesting forest products, use the services of a professional forester. For more information, see the Woodland Management Series Fact Sheet 628, “Marketing Forest Products.”

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Forest Stewardship information available online at www.naturalresources.umd.edu

Developing a Forest Stewardship Plan: The Key to Forest Management

by Jonathan S. Kays
Regional Extension Natural Resources Specialist
Western Maryland Research and Education Center
Robert T. Darden
Regional Extension Natural Resources Specialist
Wye Research and Education Center

Issued in furtherance of Cooperative Extension work, Acts of May 8 and June 30, 1914, in cooperation with the U.S. Department of Agriculture, University of Maryland, College Park, and local governments. Thomas A. Fretz, Director of Maryland Cooperative Extension, University of Maryland. The University of Maryland is equal opportunity. The University’s policies, programs, and activities are in conformance with pertinent Federal and State laws and regulations on nondiscrimination regarding race, color, religion, age, national origin, sex, and disability. Inquiries regarding compliance with Title VI of the Civil Rights Act of 1964; Title IX of the Educational Amendments; Section 504 of the Rehabilitation Act of 1973; and the Americans With Disabilities Act of 1990; or related legal requirements should be directed to the Director of Personnel/Human Relations, Office of the Dean, College of Agriculture and Natural Resources, Sycamore Hall, College Park, MD 20742.
Take a holistic view of forest management, and develop plans that consider commodity and noncommodity benefits. Management for wildlife, rare and endangered plants and animals, recreational opportunities, scenic vistas, sites of archaeological significance, and areas of future development are all part of natural resource management. These factors should be considered in developing your landowner objectives for a forest stewardship plan.

Maps
A workable forest stewardship plan should include the following maps:

Location map. A location map enables someone who is unfamiliar with your property to find it from a major highway.

Forest stand map. A forest stand map identifies the different forest stands on a woodlot according to their major species and the size of dominant trees (Figure 1). A forest stand is a group of trees that, because of their similar age, condition, past management history, or soil characteristics, are logically managed together. In many cases, this map will be drawn from an aerial photograph and will include roads, streams, ponds, houses, fields, and other landmarks.

Aerial photographs of your

Heritage Concerns
Many landowners are rightfully concerned about identifying endangered species, sensitive wildlife habitats, wetlands, unique forest areas, and other important areas during the inventory process. If these are important objectives, ask the forester to have a natural resource professional trained in heritage concerns to review your plan or visit the property. State foresters have access to resource professionals in the Heritage Division, and private foresters can also find individuals to meet this need. The results of findings can be incorporated into the stand descriptions and recommendations.

Stand Descriptions and Recommendations
For each forest stand identified on the forest stand map, there should be a description and a set of management recommendations. The stand description and recommendations can be in the form of a chart, a paragraph, or a combination of the two. The description should contain information on the age and condition of the stand and the quality of the growing site. Management recommendations that ignore these factors are not likely to be useful. Table 2 shows the Becker farm’s overall management objectives as well as the stand description and associated management recommendations for the first stand.

Chronology of Recommendations
A chronological listing of recommended management activities for the next 10 to 15 years is a valuable reference and should be included in any forest management plan. This can be updated and changed as needed, but it provides a long-term view. The list should include the following:

- the year the practice will be completed,
- the stand and number of acres for which the plan is recommended,
- a brief description of each recommended activity, and
- an estimate of the anticipated yield associated with each practice.

Table 3 shows the first 6 years of the 15-year management practice schedule on the Becker farm.

How To Get Started
The best way to start a forest stewardship plan is with a project forester from the Maryland Department of Natural Resources, Forest Service (www.dnr.state.md.us/forests/phonelist.html). To contact the forester in your county, look in the blue pages of the telephone directory under State Government, Department of Natural Resources, Forest Service, or contact the Maryland Department of Natural Resources, Forest Service, Tawes State Office Building, Room F-1, Annapolis, MD 21401. The forester will tour your woodland and help you develop forest management objectives based on your interests and goals, as well as the ability of the land to meet them. The forester can conduct an inventory of your woodland and develop a written management plan in cooperation with wildlife and fishery biologists, ecologists, and other natural resources professionals. The forester also can help you implement the plan. This assistance may include recommending private consulting foresters who can provide timber sale and management services for a fee.

Table 3. The first 6 years of the 15-year management practice schedule for the Becker farm.

<table>
<thead>
<tr>
<th>Completion Date</th>
<th>Stand Number</th>
<th>Practice Description</th>
<th>Number of Acres</th>
</tr>
</thead>
<tbody>
<tr>
<td>1994</td>
<td>1</td>
<td>Thinning (crown-touching release)</td>
<td>34</td>
</tr>
<tr>
<td>1995</td>
<td>4</td>
<td>Grapevine control on crop trees</td>
<td>62</td>
</tr>
<tr>
<td>1996</td>
<td>3</td>
<td>Harvest Virginia pine/Replant</td>
<td>11</td>
</tr>
<tr>
<td>1997</td>
<td>2</td>
<td>Thinning (crown-touching release)</td>
<td>24</td>
</tr>
<tr>
<td>1998</td>
<td>all</td>
<td>Stabilize and clear roads and trails</td>
<td>28</td>
</tr>
<tr>
<td>1999</td>
<td>5</td>
<td>Select harvest</td>
<td>28</td>
</tr>
</tbody>
</table>
The volumes provided in this inventory are not detailed enough for the sale of forest products; that requires more intensive measurement for the specific area to be harvested. However, if done properly, it can provide the landowner with the basis value of the timber for tax purposes.

The basis is the value of the timber on the land, separate from buildings and improvements, at the time of the purchase or inheritance of the property. When you discuss the development of the plan for your property, ask the forester to calculate the basis. This may help you reduce your tax burden when and if forest products are ever sold, because you are only taxed on the amount of money you make above your basis. More information on timber basis and timber tax issues is available in the publication EB360, “Forest Management Account Book.”

Wildlife Inventory Data

Wildlife habitat improvement is an important objective for most forest landowners. Landowners can manage some wildlife populations through hunting, but, in most cases, landowners are affecting the abundance of wildlife by attempting to improve availability of habitat, not by directly controlling population. There are many types of wildlife, each with different habitat requirements. Some require open field, others younger forest, and some, older forest. In many cases, a mix of habitat types is required. The management of wildlife habitats is very rewarding. Express your wildlife interests to the forester during the first meeting when objectives are being developed. The forester or wildlife biologist can then develop management recommendations in the forest stewardship plan to create or enhance a variety of habitats to meet your objectives.

The inventory of individual wildlife species is not practical, but most foresters or wildlife biologists can record visual observations and wildlife sign (droppings, marks, trails, dens, etc.) during the inventory process. We suggest you educate yourself through publications or seminars on how to identify different species and habitat. More information on wildlife species and habitat is available through the Wildlife property are available for a nominal fee from your local USDA Farm Service Agency. Photographs can be purchased back to the 1950s and provide a good opportunity to see how the landscape has developed over time. The location of your local office can be found in the blue pages of the phone book under federal government or on the web (http://www.fsa.usda.gov/eds). Boundary map. A boundary map usually is a survey map that shows the compass direction and distance along each boundary. This map can be made from a deed description verifying the corners and other landmarks that define the boundary, such as fence lines or stone walls. A boundary map is essential if you intend to actively manage the property. This map is often combined with the forest stand map. Woodland Management Series Fact Sheet 619, “How To Determine Your Property Boundaries,” describes in detail how to locate and mark boundaries.)

Topographic and soils maps. Other valuable maps are topographic maps and soils maps. Topographic maps show slopes, roads, streams, and other important landmarks. Produced by the U.S. Geologic Survey and commonly referred to as quadrangle maps, these maps are available at local backpacking or outdoor stores. They can also be accessed on the web.
Note: Data on this table are not detailed enough to be used for the sale of forest products.

Forest Inventory Data
A forest manager must inventory his or her forest periodically to determine its age and condition, what has been removed by cutting or mortality, and what new growth has occurred. Forest inventories provide the data to make sound, scientific management decisions that yield the desired results.

The following are some important points about inventories:
- It is virtually never practical or cost effective to inventory the entire forest. Rather, a random sample of the forest should be inventoried and the results applied to the rest of the forest.
- The size of the sample necessary for good decisionmaking varies from stand to stand according to the quality of a given site and intensity of management. Rarely, for example, is it sensible to pay for a highly precise timber volume inventory in a dense, young red-maple swamp or on a thin-soiled, ridge-top oak stand with little economic value. On the other hand, serious and costly mistakes can be made without good inventory data on fertile sites containing high-quality oak, ash, and pine. Also, if the landowner’s major objectives are recreation and aesthetics, the intensity of sampling would be less than for timber and wildlife management objectives, which require more active management.
- Inventories tell you what the situation is right now; however, trees grow, trees become sick, trees die, and trees are harvested. The forest is a living, dynamic system that changes over time. Inventories, therefore, need to be repeated periodically (preferably every 5 years) and the management plan updated to reflect new conditions.

An inventory of timber volume and related forest stand characteristics should be part of any forest stewardship plan where harvesting of forest products may occur. This comes from inventory data that the forester will have to collect to develop the most basic plan. Table 1 provides an example of the types of information that may be included. For each stand, the number of acres is followed by a variety of measures. Board foot volume is the term used to estimate the amount of lumber that could be harvested from standing trees greater than 12 inches in diameter. A board foot is 12 inches square by 1 inch thick and timber is typically sold by the thousand board feet. Cordwood estimates the volume available for pulpwood and similar products. Average stand diameter gives you an idea of the average diameter of the trees. Basal area is a measure of the amount of area in the forest taken up by tree stems and is useful for determining if the forest needs to be thinned. Trees on better quality sites tend to grow faster and have greater value. Stocking of desirable species refers to species that are typically grown for forest products.

Table 1. Timber inventory information for stands 1, 2, and 3 on the Becker farm.

<table>
<thead>
<tr>
<th>Stand number</th>
<th>Tree species</th>
<th>Age (years)</th>
<th>Acres</th>
<th>Total board foot volume</th>
<th>Average cordwood volume (inches)</th>
<th>Average basal area in square feet per acre</th>
<th>Quality of the site of desirable species</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>yellow poplar, ash, oak</td>
<td>50</td>
<td>32</td>
<td>90,000</td>
<td>420</td>
<td>11.2</td>
<td>120</td>
</tr>
<tr>
<td>2</td>
<td>ash, cherry, Virginia pine</td>
<td>45</td>
<td>24</td>
<td>50,000</td>
<td>160</td>
<td>10.2</td>
<td>85</td>
</tr>
<tr>
<td>3</td>
<td>Virginia pine</td>
<td>35</td>
<td>10</td>
<td>26,000</td>
<td>75</td>
<td>9.5</td>
<td>150</td>
</tr>
</tbody>
</table>

Note: Data on this table are not detailed enough to be used for the sale of forest products.
Ferr

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5

Becker farm.

Woods edge

Stream

Prepared by: Smokey Bear

Scale: 1" = 660'

Date: 1/2000

Virginia pine 35 10 26,000 75 9.5 150 poor overstocked

Property boundary

Stand boundary

Woods edge

Forest management map for Becker Farm. To manage for a variety of game and nongame wildlife while providing periodic income from the sale of timber and a supply of firewood for personal use.

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<table>
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<tr>
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<th>Total board foot volume</th>
<th>Total cordwood volume</th>
<th>Average stand diameter (inches)</th>
<th>Basal area in square feet per acre</th>
<th>Quality of Stocking</th>
<th>Stocking</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>yellow poplar, ash, oak</td>
<td>50</td>
<td>32</td>
<td>90,000</td>
<td>420</td>
<td>11.2</td>
<td>120</td>
<td>very good</td>
<td>overstocked</td>
</tr>
<tr>
<td>2</td>
<td>ash, cherry, locust, and Virginia pine</td>
<td>45</td>
<td>24</td>
<td>50,000</td>
<td>160</td>
<td>10.2</td>
<td>85</td>
<td>good</td>
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</tr>
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<td>Virginia pine</td>
<td>35</td>
<td>10</td>
<td>26,000</td>
<td>75</td>
<td>9.5</td>
<td>150</td>
<td>poor</td>
<td>overstocked</td>
</tr>
</tbody>
</table>

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Table 2. Management objectives for the Becker farm and stand description and recommendations for the first stand.

<table>
<thead>
<tr>
<th>Description of Stand #1</th>
<th>Acres</th>
<th>Dominant species</th>
<th>Timber size</th>
<th>Age in years</th>
<th>Stocking</th>
<th>Desirable species</th>
<th>Undesirable species</th>
<th>Site growth potential</th>
<th>Recommendations for Stand #1</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yellow poplar with scattered ash, oak, and red maple</td>
<td>35</td>
<td>10 to 15 inches</td>
<td>Even, 50 years</td>
<td>High</td>
<td>70 percent</td>
<td>30 percent</td>
<td>Good</td>
<td>A thinning of the forest should be done using a crown-touching release. This will allow sunlight to stimulate the growth of vegetation on the forest floor and provide more diverse wildlife habitat. The harvest will increase the growth of the remaining trees, which should be selected on their potential to produce mast and quality timber products. The wetland habitat areas at the southern part of this stand should be protected during any forest harvesting. The high density (stocking) of trees limits the development of large, mast-producing trees that produce acorns and other food for wildlife. The potential to produce high-quality timber and energy stands of yellow poplar and ash.</td>
<td></td>
</tr>
</tbody>
</table>

Stand type and age

1 Yellow poplar—50 years
2 Ash, cherry, locust, and Virginia pine—45 years
3 Virginia pine—35 years
4 Red maple, red oak, white oak, and yellow poplar—two-aged
5 Ash, red oak, and yellow poplar—12 years
6 Ash, red oak, and yellow poplar—50 years

Figure 1. A forest stand map of the Becker farm.
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**Heritage Concerns**
Many landowners are rightfully concerned about identifying endangered species, sensitive wildlife habitats, wetlands, unique forest areas, and other important areas during the inventory process. If these are important objectives, ask the forester to have a natural resource professional trained in heritage concerns to review your plan or visit the property. State foresters have access to resource professionals in the Heritage Division, and private foresters can also find individuals to meet this need. The results of findings can be incorporated into the stand descriptions and recommendations.

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1. Landowner objectives for the woodland;
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Forest stewardship plans are typically written for a 10- to 15-year period but should be updated about every 5 years. As you develop a forest stewardship plan for your woodland, remember: it is your responsibility to take the necessary steps to care for your woodland. You need to learn more about your property and the landowner’s role in forest management.

Adapted From

Landowner Objectives

There are many reasons for and many benefits to be derived from owning woodland. Most owners value the privacy and aesthetic beauty their forests provide. They may want to enjoy a recreation site nearby for themselves or for periodic income. The list of potential benefits is long.

No one can develop a forest stewardship plan that is right for you without knowing what benefits you value and what ones are unimportant to you. The first step in developing a forest stewardship plan is to set goals and objectives early in conversations with a forester or natural resources professional. The following list of questions may help:

1. What are your satisfaction level with your woodland?
2. What are your production aspirations for your woodland?
3. What are your legal requirements?
4. What are your present management practices?
5. What is the current condition of your woodland?
6. What are your potential income sources from your woodland?
7. What are your long-term goals for your woodland?

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