

**Oregon Partnership for Forestry Education  
Strategic Plan  
January 2013**

**Introduction**

This Strategic Plan was developed by and for the Oregon Partnership for Forestry Education during 2011 and 2012. The initial funding that established the Partnership came from a USFS State & Private Western Competitive Grant. This plan is a product of the Partnership, as are the numerous educational offerings provided by Partners and funded by this grant over the past two years.

Early drafts of this Strategic Plan identified educational needs and strategies that have allowed the Partnership to leverage additional federal, state and private funds to pursue these strategies and meet these needs. As important as the plan has been the process of bringing diverse organizations together and thinking as a Partnership. This collaborative planning and program delivery will continue long after the grant funds have been spent.

**A. Partnership for Forestry Education – Description**

The Partnership for Forestry Education is an innovative collaboration of government, non-profit and private organizations dedicated to providing educational resources to Oregon forest landowners, managers and operators.

**B. Partnership for Forestry Education - Partners**

- Associated Oregon Loggers (AOL)
- Oregon Committee for Family Forestlands (CFF)
- Oregon Department of Forestry, Private Forests Program (ODF)
- Oregon Forest Resources Institute (OFRI)
- Oregon Small Woodlands Association (OSWA)
- Oregon Society of American Foresters (OSAF)
- Oregon State University, Forestry & Natural Resources Extension (OSU-FNR)
- Oregon Tree Farm System (OTFS)
- USDA Forest Service - Pacific Northwest Research Station (PNW)
- USDA Forest Service - Region 6 - State & Private Forestry (S&PF)
- USDA Natural Resources Conservation Service (NRCS)
- Western Forest & Conservation Association (WFCA)

**C. Partnership for Forestry Education – Mission**

Work as a partnership of organizations to collaboratively provide educational services to Oregon's landowners, operators and resource managers to allow them to sustainably manage Oregon's forests to meet private and public objectives.

#### **D. Partnership for Forestry Education – Vision**

- Oregon's forest landowners, operators and resource managers have access to relevant and exceptional educational programs.
- Oregon's forestlands are sustainably managed to meet private and public needs.
- Oregon's family forestlands remain family-owned working forests and are successfully passed from generation to generation.
- Forest products and ecosystem services markets and infrastructure are viable and accessible enough to provide for profitable management of Oregon's forestlands.
- Forest landowners, operators and resource managers are recognized for participating in continuing education programs.
- Forest landowners, operators and resource managers are recognized by the public for their positive contributions to the environment, economy and society.
- The Partnership for Forestry Education flourishes as a service organization to forest landowners and the general public.
- Forest ecosystems and forest landowners are resilient, adaptable and vibrant.

#### **E. Partnership for Forestry Education – Strategies Summary**

To help Oregon's family forest landowners, forest operators and forest resource managers sustainably manage Oregon's forests; the Partnership for Forestry Education will pursue the following strategies:

1. Develop tools and media for basic education outreach to family forest landowners
2. Provide relevant and exceptional education to family forest landowners about:
  - a. Business and tax planning
  - b. Ecosystem services markets
  - c. Forest ecology and silviculture
  - d. Forest health (including Integrated Pest Management)
  - e. Management planning
  - f. Oregon's forest protection laws
  - g. Vegetation management
  - h. Watershed Resources
  - i. Wildfire protection
  - j. Wildlife in managed forests
3. Develop the next generation of forestry education leaders
4. Promote programs to ensure successful intergenerational transfer of family forestland
5. Support forestry education for forest operators
6. Support professional development for forest managers
7. Continue the Partnership for Forestry Education as the vehicle to reduce overlap, identify gaps and respond to the changing educational needs of the forestry community

## F. Partnership for Forestry Education – Strategies Detail

### 1. Develop tools and media for basic education outreach to family forest landowners

- The first step to successful forest management is awareness. This strategy will build awareness of the many resources, opportunities and programs available to landowners.
- Create a database and outreach system collaboratively managed by Family Forests of Oregon, OSWA and OTFS. The concept of an outreach system has not been fully developed but will include periodic mailings of newsletters and other material to subsets of the landowners in the database.
- NRCS, OSU, ODF, OFRI & USFS collaborate and provide content
- The outreach system informs landowners about resources and opportunities including:
  - Small Woodland owner networks, cooperatives and associations such as OSWA, OTFS, Oregon Woodland Cooperative, etc.;
  - Agencies to assist landowners such as NRCS, ODF, OSU & OFRI;
  - Peer-to-peer learning networks and opportunities such as Master Woodland Managers, Master Naturalists and Women Owning Woodlands Network;
  - Educational programs for forest landowners, operators and resource managers
  - Service contractors / forestry professionals such as ACF;
  - Stewardship incentives programs including NRCS farm bill programs; and
  - Sustainability and family forests.
- This strategy makes use of the following resources:
  - Partnership for Forestry Education Website (KnowYourForest.org) maintained by OFRI
  - Family Forests of Oregon Landowner database maintained by FFO
  - OSU's Pathways to Stewardship Program
- Landowner database and PFE website were funded as part of 2010 S&P Western Competitive Grant.
- Landowner outreach system and the Pathways to Stewardship Program will be funded as part of 2012 S&P Western Competitive Grant.
- Outreach to family forest landowners is essential to growth of OSWA and OTFS membership.
- American Forest Foundation is developing a “Pathways to Stewardship” program at the national level. Oregon's outreach and pathways programs can help pilot this approach. AFF may be a source of funding.
- OFRI has developed a new publication titled, *Family Forests – A guide to technical, financial and educational resources for Oregon's family forest landowners*. It could be mailed to a subset of the family forest landowners in the landowner database as part of the outreach funded by the 2012 S&P Western Competitive Grant.
- OFRI has also developed the Partnership's web page: KnowYourForest.org. KYF provides a home on the internet for the *Family Forest Landowners Resource Guide* and includes an interactive Assistance Map that lists locally based landowner resources for each county in Oregon. KnowYourForest.org includes a calendar of educational events and an archive of recent conferences.
- KnowYourForest.org's Learning Library provides an array of educational materials on topics important to woodland owners. Publications, videos, presentations and resource links are provided on topics such as Getting Started, Tree Identification, Planting, Thinning, Fire, Wildlife, Forest Health, Logging & Marketing Timber, Non-timber Forest Products, Forest

Protection Laws, Forest Management Planning, Weeds & Invasive Species and Forest Certification. Each topic has an identified *Content Expert* who is responsible for contributing and updating information on that topic. These *Content Experts* and their contact information are listed in Appendix A of this report.

## 2. Provide relevant and exceptional education to family forest landowners

### a. Business and tax planning

- Family forest landowners need to understand the business and tax implications of their management and how to manage forestland as a business enterprise.
- OSU formerly had a strong program in business and tax planning education and seeking resources to rebuild this program is a priority in the long term.
- Many excellent OSU publications and existing PowerPoints can be used in the interim.
- Need strong collaboration here, because no base program currently exists.
- Collaborate with Ties-to-the-Land, American Forest Foundation, private accountants and attorneys, Austin Family Business Program, and Small Business Development Centers.
- Topics that need to be developed and included are:
  - Forest taxation
  - Basis and depreciation
  - Record keeping
  - Estate planning
  - Conservation easements
  - Land trusts
- An OSU Extension agent could provide leadership to help coordinate program delivery using existing resources in a collaborative manner.
- New funding will be sought to develop this new program. Potential funding partners include:
  - Natural Resource Conservation Service
  - American Forest Foundation
  - USFS S&P Western Competitive Grants

### b. Ecosystem services markets

- Oregon's forest landowners are interested in expanding revenue from their forests beyond traditional timber markets to encompass ecosystem service markets. Expanding markets for ecosystem services are considered key to maintaining profitability for family forestlands and thus are key to keeping them in forest use.
- OSU Forestry and Natural Resources Extension will take the lead and develop this educational program collaborating with other partners to deliver it.
- This has not been a traditional area for landowner education, so it is an opportunity to develop a new program.
- This program will be a model for other states and regions to use.
- Key opportunities include:
  - Conservation easements and land trusts
  - Carbon sequestration / carbon credits
  - Hunting leases and fee hunting

- Water quality incentives
- Non-timber forest products
- New funding will be sought to develop this new program. Potential funding partners include:
  - Natural Resource Conservation Service (specifically the Conservation Innovation Grants program)
  - American Forest Foundation
  - USFS S&P Western Competitive Grants
  - Bonneville Environmental Foundation
  - 1000 Friends of Oregon
  - The Nature Conservancy

**c. Forest ecology and silviculture**

- Oregon's family forest landowners are very interested in understanding the ecology and silviculture of their forests so they can manage them sustainably and maintain forest health.
- Eastern Oregon forests present different ecology and silvicultural challenges that requires development of materials specific to dry forest ecologies.
- Topics of interest include:
  - Plant and tree identification
  - Basic forest ecology
  - Principles of silviculture
  - Alternatives to traditional Douglas-fir and ponderosa pine forestry
  - Adaptation to global and climate change and other stressors
  - Timber harvesting
  - Reforestation
- OSU will lead with resources from OFRI & others
- This is a traditional strength of OSU Forestry and Natural Resources Extension so there are some existing resources. However, budget cuts have reduced these resources and additional resources will be needed to meet the needs of Oregon landowners.
- This is a natural area for online resources. There is an existing Silviculture Module that has been developed by OSU.
- OSU-FNR and OFRI have publications and fact sheets on this subject.
- OSU-FNR and OFRI are developing a new publication on Establishing and Managing Forest Trees in Western Oregon.
- Potential funding partners include:
  - Natural Resource Conservation Service
  - American Forest Foundation
  - USFS S&P Western Competitive Grants

**d. Forest health**

- Oregon's forests are at risk for a variety of forest health problems while forest landowners are keenly interested in keeping their forests and those of neighbors healthy, productive and sustainable.
- There is an existing program led collaborative by OSU and ODF.

- OSU Forest Health Specialist coordinates much of the existing education. ODF forest pathologist and entomologist are available for assistance.
- Topics include:
  - What is a healthy forest?
  - Insects
  - Diseases
  - Invasive/noxious weeds laws and landowner responsibilities
  - Integrated pest management
  - Fire regime condition class
  - Forest management to reduce fire risk
  - Pest Scene Investigation
  - Animal damage control
  - Forest fragmentation and development
  - Urban forest health
  - Climate change and its impacts on forest health and fire risk
- Venues include regional Tree School and local Extension workshops.
- New resources are needed to expand this program to meet the needs of landowners. Potential funding, information and teaching partners include:
  - Natural Resource Conservation Service
  - American Forest Foundation
  - USFS S&P Western Competitive Grants
  - USDA APHIS
  - USFS PNW Research Station

**e. Management planning**

- Forest management planning is one of the keys to ensuring active and sustainable management of family forestlands.
- Increasing the number and quality of management plans is one of the keys to the expansion of the Oregon Tree Farm System.
- The newly developed Uniform Management Planning Protocol will be used as the basis for this strategy. This protocol establishes a uniform system to be used for all family forest landowner management plans. The system has been agreed to by the Oregon Tree Farm System, the Oregon Department of Forestry, the Natural Resources Conservation Service, the Forest Stewardship Council, and the OSU Forestry and Natural Resources Extension Program.
- Successional planning will be included as a topic through the “Ties to the Land” program.
- OSU leads Mentored Management Planning Program.
- OSU provides training for Consultants.
- OSU has built and is maintaining the Oregon Forest Management Planning Webpage.
- Funded as part of 2010 S&P Western Competitive Grant
- OTFS Inspectors and ACF consultants will serve as mentors and certifiers.
- OSU Master Woodland Managers will serve as mentors.
- NRCS Technical Service Providers (TSP) and staff will provide technical assistance and serve as mentors.

- ODF Stewardship Foresters and Private Forestry Program will support educational programs, provide one-on-one technical assistance and serve as mentors.

**f. Oregon's forest protection laws**

- Forest landowners and managers in Oregon are faced with a comprehensive set of forest practices rules and a myriad of other laws that must be complied with in managing their forests. This strategy will continue an educational program to help landowners understand and cost-effectively comply with these laws. This is a high priority for landowners.
- OFRI's *Oregon's Forest Protection Laws: An Illustrated Manual* will be used as a basic resource in this strategy. The revised second edition has been completed and part of the cost of printing was funded as part of 2010 S&P Western Competitive Grant
- OSU Extension will offer periodic workshops for landowners at venues including Tree Schools.
- Associated Oregon Loggers will offer workshops for operators as indicated in D.1. below.
- ODF Stewardship Foresters will support educational programs and provide one-on-one technical assistance for landowners
- Education on other Forest Protection Laws such as fire and chemical rules will be included.
- As a complement to covering the laws themselves, OSU Extension also offers educational programs and materials to help landowners and others understand and participate in the policy making process.
- This topic will be integrated into other programs such as MWM trainings, Mini-College, Fact Sheets and KnowYourForest.org website.
- Funded as part of 2010 S&P Western Competitive Grant

**g. Vegetation management**

- Oregon's productive forestlands excel in growing competing vegetation as well as timber. Landowners need to successfully manage competing vegetation to be successful.
- OSU's Vegetation Integrated Pest Management Program forms the basis of this strategy. Topics include:
  - Alternatives to herbicides
  - Appropriate use of herbicides
  - Pesticide applicator training
  - Forest protection laws
  - Invasive/noxious weeds laws and landowner responsibilities
- Funded as part of 2010 S&P Western Competitive Grant
- Workshops are delivered by OSU Forestry and Natural Resource Extension faculty at regional Tree Schools and other venues.
- Partners include:
  - ODF Stewardship Foresters
  - Oregon Department of Agriculture
  - Oregon Invasive Species Council

#### **h. Watershed resources**

- Sustaining watershed resources is a key area of education for Oregon's forest landowners. Providing public watershed resource benefits is paramount to maintaining the social license to practice forestry in Oregon.
- Key topics include:
  - Soil conservation principles and practices
  - Riparian function and management
  - Aquatic habitat protection and enhancement
  - Protecting water quality & quantity
  - Technical and financial assistance available for watershed improvements
  - Extending and applying knowledge from historic and contemporary "Paired Watershed Studies"
  - Using herbicides safely and effectively
  - Unique considerations for Wildland Urban Interface areas
  - Maintaining and improving woodland roads
  - Woodland ponds
- OSU Extension led
- Watershed Stewardship Education Program has resources aimed at Watershed Councils
- Lots of technical materials are available, but more synthesis is needed for broader understanding and application
- Collaborate with Watershed Councils & OWEB
- There are natural ties with the Watershed Research Cooperative and its contemporary Paired Watershed Studies

#### **i. Wildfire protection**

- Oregon's forests are at risk for wildfire and family forest landowners are keenly interested in protecting their forests and those of neighbors.
- Woodland owner fire schools will be sponsored by local OSWA chapters and taught by ODF and OSU-FNR
- Topics include:
  - Basic firefighting
  - Fire equipment and rules
  - Fireproofing your forest
  - Fire event pre-planning
  - Defensible space
  - How wildfire interacts with other resources (e.g. wildlife)
- ODF will lead this strategy with OSU & OSWA support
- This is a traditional strength of the Oregon Department of Forestry so there are some existing resources. However, budget cuts have reduced these resources and family forest landowner education has not been a traditional task of the ODF fire program. Additional resources will be needed to meet the needs of Oregon family forest landowners.
- OSU-FNR has publications and fact sheets
- USFS-PNW has new research and publications
- This is a peer-to-peer learning opportunity

- Potential funding partners include:
  - Natural Resource Conservation Service
  - American Forest Foundation
  - USFS S&P Western Competitive Grants

**j. Wildlife in managed forests**

- Many landowners manage for wildlife as a priority and coexist safely with wildlife.
- Forest wildlife habitat is a very important public benefit provided by Oregon's forest landowners. This strategy will provide education on this area of high priority to landowners.
- OFRI/OSU will collaboratively lead this educational program
- Funded as part of 2012 S&P Western Competitive Grant with matching resources from OFRI
- OFRI's *Wildlife in Managed Forests* publication series will provide a cornerstone for this program.
- Topics include:
  - Deer and elk
  - Endangered species laws and requirements.
  - Protection
  - Snags, down logs
  - Structure
  - Thinning
  - Shrubs
- Workshops will be presented at regional Tree Schools, local workshops, small woodlands meetings and other venues.
- ODF&W will continue to host workshops for landowners on Oregon's Conservation Strategy (<http://www.dfw.state.or.us/conservationstrategy/>)
- Wildlife in Managed Forests Webpage will be developed as part of the Partnership for Forestry Education website.
- Key partners include:
  - NRCS
  - ODF&W
  - USFW
  - NCASI
  - Private Wildlife biologists
  - Woodland Fish & Wildlife Group

**3. Develop the next generation of forestry education leaders**

- Robust and viable peer-to-peer learning networks will be supported including:
  - Master Woodland Managers
  - Forest operators
  - Women Owning Woodlands
  - Oregon Small Woodlands Association
  - Oregon Tree Farm System
  - Society of American Foresters
  - Youth in forestry
  - Oregon Woodlands Cooperative

- The new PNW Forestry Leadership Academy will be developed and held periodically to encourage and provide skills for forest owners and resource managers to take active leadership roles in Oregon forestry organizations.
- The Leadership Academy will be funded as part of 2012 S&P Western Competitive Grant and through an American Forest Foundation capacity building grant to the Oregon Tree Farm System.
- The Leadership Academy will be led by OFRI and OSU with a steering committee consisting of OSAF, OTFS, OSWA & others.

#### 4. **Promote programs to ensure successful intergenerational transfer of family forestland**

- An education program to help forest landowners plan for intergenerational transfer of their lands.
- Ties-to-the-Land is administered by OSU Extension and the Austin Family Business Center. It is taught in the field by Extension faculty and professionals.
- Initial funding was from OFRI. Additional funding was from American Forests Foundation.
- Current funding for Ties is as part of a multi-state 2010 S&P Western Competitive Grant.

#### 5. **Support forestry education for forest operators**

- Led by Associated Oregon Loggers
- Assistance from OSU Extension and forestry consultants
- Key topics include:
  - Forest Protection Laws Education
  - Business Education
  - Silviculture & Forest Ecology Education
  - Forest Health
  - Safety
- Key venues include:
  - AOL Annual Meetings
  - Oregon Logging Conference
  - Regional AOL workshops
- ODF Stewardship Foresters support educational programs and provide one-on-one technical assistance for forest operators
- Hispanic operators may be a new audience – funding is available for translation into Spanish

#### 6. **Support professional development for forest managers**

- Led by Oregon Society of American Foresters, Western Forest and Conservation Association and OSU College of Forestry
- Chapter meetings, conferences, OSAF Annual Meeting and SAF National Conventions are key events
- Assistance from OSU, OFRI, Stoel-Rives Attorneys & others in providing periodic workshops, conferences and other events for forest managers
- Associated Consulting Foresters members and SAF's Certified Foresters are key audiences
- OSAF Continuing Forestry Education coordinator is key to getting CFE credits for program

- OSAF CFE coordinator and OSAF Science Chair could play expanded roles in working with education providers including OSAF Chapters to develop and present relevant forest manager education.
- OSU College of Forestry is developing a strategy to revitalize Continuing Professional Education. Their program will provide leadership to provide a suite of continuing education offerings for forestry and natural resource professionals while tying in with OSAF & WFCA.

**7. Continue the Partnership for Forestry Education as the vehicle to reduce overlap, identify gaps and respond to the changing educational needs of the forestry community**

- Led jointly by OFRI and OSU.
- Yearly Partner meetings will be held to update on partner activities.
- Grants will be applied for to develop new programs and continue existing programs outlined in this Strategic Plan.
- The KnowYourForests.org website will be maintained and expanded by OFRI and the various Content Experts.
- The Family Forest Landowner Resource Guide will be updated and printed annually.
- The PFE Strategic Plan will be updated periodically and a new plan will be developed in 2015.

## **G. Partnership for Forestry Education – Strategic Planning Process**

### **1. Strategic Planning Workshops:**

This Partnership for Forestry Education strategic plan was developed by the primary partners listed below through a series of workshops and an iterative process of reviews and informal input sessions. Leadership for the strategic plan was provided by OFRI's Mike Cloughesy.

Major planning workshops were held as follows:

- November 16, 2010 – OSU, Corvallis
- January 11, 2011 – ODF, Salem
- March 11, 2011 – ODF, Salem
- December 1, 2011 – Oregon Garden Resort, Silverton
- December 11, 2012 – OSU, Corvallis

### **2. Primary Partners:**

- Associated Oregon Loggers – Rex Storm
- Committee for Family Forestlands – Susan Watkins
- Oregon Department of Forestry – Lena Tucker, Jim Cathcart, Cynthia Orlando & Steve Vaught
- Oregon Forest Resources Institute – Mike Cloughesy and Julie Woodward
- OSU Forestry & Natural Resources Extension – Jim Johnson, Janean Creighton, Rick Fletcher, Amy Grotta, Glenn Ahrens and Nicole Strong
- Oregon Small Woodlands Association – Jim James & Jen Rains
- Oregon Society of American Foresters – Norm Michaels & Ron Boldenow
- Oregon Tree Farm System – Joe Holmberg
- USFS Pacific Northwest Research Station – Cindy Miner
- Western Forest & Conservation Association – Richard Zabel

### **3. Partner Descriptions & Matrix – December 1, 2011**

Each partner completed a partner description which included:

- Partner
- Contact
- Programs
- Description
- Topics

These descriptions were compiled into a Partnership Planning Matrix which is included here.

Partner	Audiences	Programs	Description/Topics
<p><b>Associated Oregon Loggers (AOL)</b></p> <p>Rex Storm, forest policy manager  <a href="mailto:rexstorm@oregonloggers.org">rexstorm@oregonloggers.org</a>                      503-364-1330  <a href="http://www.oregonloggers.org">www.oregonloggers.org</a></p>	<ul style="list-style-type: none"> <li>• Forest operators</li> <li>• Forest contractors</li> </ul>	<ul style="list-style-type: none"> <li>• Workshops</li> <li>• Field tours</li> <li>• Newsletter</li> <li>• Regional meetings</li> <li>• Annual conference</li> </ul>	<p>AOL is the statewide trade group for forest operators and contractors. AOL administers the Oregon Professional Logger is a continuing education &amp; certification program for forest operators.</p> <p>Topics include:</p> <ul style="list-style-type: none"> <li>• Forest practices rules &amp; compliance</li> <li>• Forest protection regulation &amp; compliance</li> <li>• Sustainable forestry</li> <li>• Forest activity safety &amp; loss control</li> <li>• Business regulation</li> </ul>
<p><b>Oregon Committee for Family Forestlands (CFF)</b></p> <p>Craig Shinn, Chair  <a href="mailto:shinncc@pdx.edu">shinncc@pdx.edu</a></p> <p>Susan Watkins, Vice-chair  <a href="mailto:maczenith@onlinemac.com">maczenith@onlinemac.com</a>  <a href="http://www.oregon.gov/ODF/BOARD/CFF/cff.shtml">www.oregon.gov/ODF/BOARD/CFF/cff.shtml</a></p>	<ul style="list-style-type: none"> <li>• Board of Forestry</li> <li>• Woodland owners</li> </ul>	<ul style="list-style-type: none"> <li>• Conferences</li> <li>• Website</li> </ul>	<p>CFF is a standing committee of the Oregon Board of Forestry that advises the Board on family forestland issues.</p> <p>Topics include:</p> <ul style="list-style-type: none"> <li>• Policy issues for family forest landowners</li> </ul>
<p><b>Oregon Department of Forestry Private Forests Program (ODF)</b></p> <p>Lena Tucker, deputy chief for private forests  <a href="mailto:ltucker@odf.state.or.us">ltucker@odf.state.or.us</a>                      503-945-7529  <a href="http://www.oregon.gov/ODF">www.oregon.gov/ODF</a></p>	<ul style="list-style-type: none"> <li>• Forest operators</li> <li>• Woodland owners</li> <li>• Industrial forest owners</li> <li>• Local government officials</li> <li>• Professional foresters</li> <li>• Realtors</li> <li>• Conservation interests</li> </ul>	<ul style="list-style-type: none"> <li>• Workshops</li> <li>• Field tours</li> <li>• Website</li> <li>• Personal contacts</li> </ul>	<p>ODF is the state forestry agency responsible for fire protection, forest practices rules, forest health initiatives and state forest management. ODF assists landowners by providing professional expertise on sound forest management and effective solutions to specific landowner problems.</p> <p>Topic areas include:</p> <ul style="list-style-type: none"> <li>• Pest management</li> <li>• Forest practices rules</li> <li>• Management planning</li> <li>• Technical assistance</li> <li>• Fire prevention</li> <li>• Urban forestry</li> <li>• Conservation</li> </ul>

Partner	Audiences	Programs	Description/Topics
<p><b>Oregon Forest Resources Institute (OFRI)</b></p> <p>Mike Cloughesy, director of forestry  <a href="mailto:cloughesy@ofri.org">cloughesy@ofri.org</a>            971-673-2955  <a href="http://www.KnowYourForest.org">www.KnowYourForest.org</a></p>	<ul style="list-style-type: none"> <li>• Forest operators</li> <li>• Forest contractors</li> <li>• Woodland owners</li> <li>• Professional foresters</li> </ul>	<ul style="list-style-type: none"> <li>• Conferences</li> <li>• Workshops</li> <li>• Field tours</li> <li>• Publications</li> <li>• Website</li> <li>• Demonstration forest</li> </ul>	<p>OFRI is a state agency charged with educating Oregonians about forestry.            Topics include:</p> <ul style="list-style-type: none"> <li>• Research updates</li> <li>• Economic impact of forest sector</li> <li>• Green building</li> <li>• Forest certification</li> <li>• Forest protection laws</li> <li>• Wildlife in managed forests</li> </ul>
<p><b>Oregon State University Forestry &amp; Natural Resources Extension Program (OSU)</b></p> <p>Jim Johnson, F&amp;NR Extension program leader  <a href="mailto:jim.johnson@oregonstate.edu">jim.johnson@oregonstate.edu</a>            541-737-8954  <a href="http://extensionweb.forestry.oregonstate.edu/">http://extensionweb.forestry.oregonstate.edu/</a></p>	<ul style="list-style-type: none"> <li>• Forest operators</li> <li>• Forest contractors</li> <li>• Woodland owners</li> <li>• Natural resource professionals</li> <li>• Christmas tree growers</li> </ul>	<ul style="list-style-type: none"> <li>• Conferences</li> <li>• Workshops</li> <li>• Field tours</li> <li>• Tree schools</li> <li>• Volunteer service</li> <li>• Videos</li> <li>• Online learning</li> <li>• Publications</li> <li>• Websites</li> <li>• Demonstration forests</li> </ul>	<p>OSU Forestry Extension is the outreach and non-formal education arm of the College of Forestry.            Topics include:</p> <ul style="list-style-type: none"> <li>• Basic Forestry Short Course</li> <li>• Forest practices rules</li> <li>• Forest management planning</li> <li>• Forestry assistance</li> <li>• Intergenerational transfers</li> <li>• Watershed resources</li> <li>• Wildlife management</li> <li>• Forest certification</li> <li>• Forest products marketing</li> <li>• Reforestation</li> <li>• Silviculture</li> <li>• Peer-to-peer learning networks</li> </ul>
<p><b>Oregon Small Woodlands Association (OSWA)</b></p> <p>Jim James, executive director  <a href="mailto:jimjamesoswa@yahoo.net">jimjamesoswa@yahoo.net</a>            503-588-1813  <a href="http://www.oswa.org">www.oswa.org</a></p>	<ul style="list-style-type: none"> <li>• Woodland owners</li> </ul>	<ul style="list-style-type: none"> <li>• Annual meetings</li> <li>• Chapter field tours</li> <li>• Howdy Neighbor Tours</li> <li>• Newsletters</li> <li>• Website</li> </ul>	<p>OSWA is a statewide membership organization for family forest landowners.            Topics include:</p> <ul style="list-style-type: none"> <li>• Family forest management</li> <li>• Forest products markets</li> <li>• Intergenerational transfers</li> <li>• Carbon markets</li> <li>• Ecosystem service markets</li> <li>• Stewardship planning</li> <li>• Forestry assistance</li> <li>• Taxes</li> </ul>

Partner	Audiences	Programs	Description/Topics
<p><b>Oregon Society of American Foresters (OSAF)</b></p> <p>Ron Boldenow, OSAF chair (2013)  <a href="mailto:rboldenow@cocc.edu">rboldenow@cocc.edu</a>            541-383-7754  <a href="http://www.forestry.org">www.forestry.org</a></p>	<ul style="list-style-type: none"> <li>Professional foresters</li> </ul>	<ul style="list-style-type: none"> <li>Annual meetings</li> <li>Conferences</li> <li>Workshops</li> <li>Field Tours</li> <li>Website</li> </ul>	<p>OSAF is the local branch of the national membership organization of professional foresters. SAF runs a Continuing Forestry Education program for its members and to allow Certified Foresters to meet their CFE requirements and remain certified. SAF provides forestry education at the local, state and national levels. Topics include all aspects of forestry.</p>
<p><b>Oregon Tree Farm System (OTFS)</b></p> <p>Jim James, administrator  <a href="mailto:jimjamesoswa@yahoo.net">jimjamesoswa@yahoo.net</a>            503-588-1813  <a href="http://www.otfs.org">www.otfs.org</a></p>	<ul style="list-style-type: none"> <li>Woodland owners</li> <li>Professional foresters</li> </ul>	<ul style="list-style-type: none"> <li>Annual meeting workshops</li> <li>Tree farm tours</li> <li>Inspector trainings</li> <li>Newsletter</li> <li>Webpage</li> <li>Videos</li> </ul>	<p>OTFS is the local branch of a national program that educates, certifies and recognizes tree farmers.</p> <p>Topics include:</p> <ul style="list-style-type: none"> <li>Forest certification</li> <li>Family forest management</li> <li>Forest products markets</li> <li>Ecosystem service markets</li> </ul>
<p><b>USDA Forest Service Pacific Northwest Research Station (PNW)</b></p> <p>Cindy Miner, assistant station director  <a href="mailto:clminer@fs.fed.us">clminer@fs.fed.us</a>            503-808-2135  <a href="http://www.fs.fed.us/pnw/">http://www.fs.fed.us/pnw/</a></p>	<ul style="list-style-type: none"> <li>Professional foresters</li> <li>Forest scientists</li> </ul>	<ul style="list-style-type: none"> <li>Conferences</li> <li>Workshops</li> <li>Webpage</li> <li>Online Learning</li> <li>Publications</li> </ul>	<p>The PNW Station is the regional arm of the research branch of the USFS. Part of its mission is technology transfer.</p> <p>Topics include:</p> <ul style="list-style-type: none"> <li>Research updates</li> <li>Resource analysis and monitoring</li> <li>Land and watershed management</li> <li>Ecosystem processes</li> <li>Threat characterization</li> <li>Goods, services and values</li> </ul>
<p><b>USDA Forest Service – State &amp; Private Forestry (S&amp;PF)</b></p> <p>Ray Abriel, manager for landowner assistance  <a href="mailto:rabel@fs.fed.us">rabel@fs.fed.us</a>            503-808-2355  <a href="http://www.fs.fed.us.spf">www.fs.fed.us.spf</a></p>	<ul style="list-style-type: none"> <li>Woodland organizations</li> <li>State forestry agencies</li> </ul>	<ul style="list-style-type: none"> <li>Publications</li> <li>Website</li> <li>Financial assistance</li> </ul>	<p>State and Private Forestry provides financial and technical assistance for family forest landowners through state forestry agencies and other partners for resource management activities and project implementation, education, assistance, conferences, workshops and online learning.</p>

<p><b>USDA Natural Resource Conservation Service (NRCS)</b></p> <p>Misty Seaboldt, state forester  <a href="mailto:misty.seaboldt@or.usda.gov">misty.seaboldt@or.usda.gov</a>  503-414-3204  <a href="http://www.nrcs.usda.gov">www.nrcs.usda.gov</a></p>	<ul style="list-style-type: none"> <li>• Woodland owners</li> <li>• Professional foresters</li> </ul>	<ul style="list-style-type: none"> <li>• Publications</li> <li>• Website</li> <li>• Online learning</li> <li>• Financial assistance</li> </ul>	<p>NRCS is the branch of the US Department of Agriculture that handles all of the financial assistance and a great deal of the technical assistance and specifications for projects. Their natural resource conservation programs help landowners reduce soil erosion, enhance water supplies, improve water quality and increase wildlife habitat. The NRCS works closely with county-based Soil &amp; Water Conservation Districts. Its mission also includes education related to these programs.</p>
<p><b>Western Forest &amp; Conservation Association (WFCA)</b></p> <p>Richard Zabel, executive director  <a href="mailto:richard@westernforestry.org">richard@westernforestry.org</a>  503-226-4562</p>	<ul style="list-style-type: none"> <li>• Professional foresters</li> <li>• Natural resource scientists</li> </ul>	<ul style="list-style-type: none"> <li>• Annual meetings</li> <li>• Conferences</li> <li>• Workshops</li> <li>• Field trips</li> </ul>	<p>WFCA is a regional membership non-profit for forestry companies and consultants in the west. WFCA is the primary vendor for education of professional foresters.</p> <p>Topics include:</p> <ul style="list-style-type: none"> <li>• Silviculture &amp; forest management</li> <li>• Native plants &amp; restoration</li> <li>• Forest policy</li> <li>• Forest economics</li> <li>• Growth &amp; yield</li> </ul>

#### 4. **Gap Analysis** – October 31, 2011

At the January 11, 2011 workshop, a brainstorming session was held to identify gaps in meeting the educational needs of Landowners, Operators and Forest Managers. The summarized gaps will be compared to the inferred needs identified in the confirmed needs assessment. The revised gaps are shown here:

##### a) **Gaps – Landowners**

- Forest practice rules
- Vegetation Management
  - Vegetation Management Cooperative Information
  - Integrated Pest Management methods
  - Deliver this information to Small Woodland Owners
- Management Planning
- Residential Forest Outreach (urban-interface) (Amy Grotta doing workshops with Paul Reis)
- Reforestation (meeting rules, invasives control)
- Educational delivery on Landowner Guide available through Soil and Water Conservation Districts and NRCS
- Fire prevention education (burning, chain saw use) – could partner with Keep Oregon Green Association
- Ecosystem services
- Marketing
  - Various products
  - Diverse markets for all products
- Non-timber forest products (NTFP)
- List of NTFPs and markets
- Recreational uses of lands
- Home site development in the forest
- Gap between eastside and westside properties – eastside economics for owning forests is bad
- Revenue streams needed for property stewardship (FSA, NRCS)
- Education about federal and other financial incentive programs
  - Oregon Technical Advisory Committee – Forming a stewardship committee that could be a partner in this
- Financial portfolio development education for Small Woodland Owners
- Succession planning across generations (linking to financial)
- Conservation easements – non-family inheritance options for succession
- Different but related audience – training professionals (CPAs, lawyers, foresters) to work with Small Woodland Owners
- Reaching successors with information about programs and information available

- Forest health – what is a healthy forest?
- Teaching educators how to talk with and understand values of landowners.
- Education available but technical assistance and services is not. Need more and better contractors for interface owners.
  - Tie to residential forest outreach

**b) Gaps – Operators**

- Forest practices education
- Fire prevention regulations
- Do it yourself operators do not have same training and expertise as professional contractors
- Doing business with Small Woodland Owners (need to educate Land Owners on this relationship, too)
- Business training needed (Partners – community colleges, Austin Family Business Program)
- Workforce development (all forest management activities) for forestry operators (potential partners – OROSHA, Community Colleges, AOL, self training by operators) (New logging engineer with USFS – OSU)
- Workforce recruitment
- Technology improvement in practice – (OSU used to help with this)
- Herbicide applicators
  - Laws and regulations
  - How to work effectively with SWOs
- Materials and training in Spanish and other languages (ESL training)

**c) Gaps - Forest Managers**

- Technology transfer from cooperatives to professional managers (beyond cooperative members)
- Significant difference in needs between:
  - Federal managers
  - Industrial managers
  - Service providers
- Technical Service Provider and technology skills for consultants
- Climate change education for federal managers. May be opportunity in the future to partner with PNW station (maybe more than climate).
- Implementing conservation strategy and region Plan (ODF&W, Def. of Wildlife, NGOs, nature conservancy) – communicate to landowners. Target landowners, managers, profs) statewide forest assessment.
- Taxation training – OSWA has recognized
  - USFS (Linda Lang)
- Appraisals
  - ACF
  - TIMOs and REITS

- No standards for forestry
- Financial issues on keeping forests in forest – taxes, markets, costs
  - Audience – consultants and midsize landowners

## 5. Inferred Needs Assessment – October 31, 2011

At the January 11 workshop, a brainstorming session was also held to identify needs assessments for forest landowners that had been conducted in the last decade.

Needs assessment identified and analyzed include:

- OFRI Family Forest Survey – 2004
- National Woodland Owner Survey – 2008
- OSWA Membership Survey – 2006
- CFF 2001 FFL Symposium Participant Survey – 2004
- Creighton - Climate Change Survey – 2010
- Fischer-Bliss Oak Woodlands Survey – 2008
- Pinchot Next Generation Survey – 2005
- Grotta – ANREP New Woodland Owner Needs Summary – 2010
- 2007 FFL Symposium Regional Roundtable Summary – 2007
- 2007 FFL Symposium Summary – 2007
- Peer-to-Peer Learning Workshop – 2011
- Washington County Woodland Owner Survey – 2002
- Reclaiming Forestry Women’s Empowerment – 2009

After the workshop, an OSU College of Forestry graduate student, Deanne Carlson took on the compilation of inferred needs from these various assessments as her graduate project.

A total of 89 distinct topics were identified by Deanne and reported in August 2011 as being important to forest landowners and were grouped into 10 major themes or categories:

- Laws and regulations
- Business practices and marketing
- Intergenerational planning
- Forest management operations
- Invasives and pest management
- Fire control and use
- Sustainability and ecosystem services
- Non-timber forest products
- Small woodlands as a home
- Networking and resources

## 6. Inferred Needs Theme Details:

The Inferred Needs Themes are each made up of a number of individual educational needs identified by Oregon landowners in the various assessment tools analyzed.

### **a) Laws and Regulations:**

- *Forest Practices Act requirements*
- *Endangered Species laws and requirements*
- *State-wide/county land use planning*
- *Riparian and Wetland Requirements*
- *Trespassing Laws*

### **b) Business Practices and Marketing:**

- *Business Planning*
- *Stewardship and Ecosystem Services Incentive Programs and Opportunities*
- *Forest Product Certifications (FSC, SFI, ATFS)*
- *Small Woodland Owner networks and co-ops (equipment leasing, seedling purchase, group contracting opportunities, etc.)*
- *Log marketing*
- *East-side issues; log markets, hauling costs, invasives, fire, etc.*
- *Creating your management plan*

### **c) Intergenerational Planning:**

- *Estate Planning*
- *Tax planning*
- *Successor Workshops: such as Ties to the Land*
- *Alternatives to sale and/or timber liquidation*

### **d) Forest Management Operations:**

- *Labor laws*
- *Roads*
- *Non-Douglas-fir and p-pine forests; Oak woodland, fraxinus, Sitka spruce, lodgepole/pumice soils*
- *Alternatives to “traditional” D-fir and p-pine forestry – red alder, hemlock, larch, true firs, madrone, redwood*

### **e) Invasives and Pest Management:**

- *Integrated Pest Management*
- *Species Identification; invasive plants, insects, pathogens*
- *Invasive/noxious weeds laws and landowner responsibilities*
- *Swiss needle cast and other major diseases*
- *Pesticide alternatives*

**f) Fire Control and Use:**

- *Woodland Firefighting; fire tools, chainsaws, pumps, fire behavior*
- *Prescribed burning and industrial precautions (burning, industrial restrictions)*
- *Firewise and urban-woodland interface information*
- *Fireproofing your forest, fire event pre-planning*
- *Planning for wildfire (escape route planning, pets, livestock, water systems, etc)*

**g) Sustainability and Ecosystem Services:**

- *Ecosystem services*
- *Conservation easements and land trusts*
- *Coarse woody debris*
- *Non-Douglas-fir and p-pine forests; Oak woodland, fraxinus, Sitka spruce, lodgepole/pumice soils*
- *Implications of managing for endangered species*
- *Conflicts between non-game / non-timber management and OFPA*

**h) Non-timber Forest Products:**

- *Agro-tourism*
- *Biofuels*
- *“Organic” Christmas trees, berries, salal, mosses, mushrooms*

**i) Small Woodlands as a Home:**

- *Recreational use of lands*
- *Home site development in the forest: Road maintenance, fire control, visual appearance, hazard trees.*
- *Wildlife interactions (bear, cougar, deer, implications for domestic animals and pets, crops, etc)*
- *Private water systems operation and safety*
- *Disaster planning and resilience; floods, landslides, earthquakes, windstorms, drought, fire*
- *Fireproofing your home (non-wildfire)*

**j) Networking and Resources:**

- *Selecting a logger*
- *Service contractors / Forestry Professionals*
- *Cooperatives and associations (OSWA, etc)*
- *OSU Extension, Watershed Councils, ODF service foresters, USFS, ODFW, USFW, NGO's, etc*
- *Resources for women – WOW-net, etc:*
- *Resources for youth*
- *Peer-to-peer learning networks and opportunities*

**7. OSAF Needs Assessment – March 11, 2011**

- *Brainstormed a list of educational needs at an OSAF Executive Committee meeting.*
- *List was grouped into themes and shared with OSAF leadership*

## **8. Joint Mission and Vision Statements – Fall 2011**

These were developed in draft form by OFRI and reviewed and commented by the partners using e-mail. Final forms were adopted at the December 1, 2011 strategic planning workshop.

## **9. Partnership for Forestry Education Strategies – Fall 2011**

Partner descriptions, the Partnership Planning Matrix, Identified Gaps, the Inferred Needs Assessment and Joint Mission and Vision Statements will be used to develop the draft Partnership Strategies including a list of forestry education priorities, organizational roles and funding needs to deliver forestry education in Oregon over the next five years. These strategies will be drafted by OFRI and shared with an expanded list of partners for review and comment. The final strategies were adopted at the December 1, 2011 strategic planning workshop.

## **10. Partnership Strategic Plan Final Report – December 31, 2012**

OFRI compiled this report based on the products developed in the strategic planning process.

Elements of the report include:

- Partnership Planning Matrix
- Gap Analysis
- Inferred Needs Assessment
- Joint Mission and Vision Statements
- Partnership for Forestry Education Strategies

This December 2012 version of the Partnership for Forestry Education Strategic Plan serves as the final report.

## **11. Looking Forward**

The Partnership for Forestry Education Strategic Plan as presented here will continue to be implemented by the Partners. At our final workshop, it was agreed that we should open the Partnership to Environmental NGOs including Wallowa Resources, Sustainable Northwest and Northwest Natural Resources Group. During 2013, an effort will be made to include these groups in the Partnership.

There is no specific timeline to update or monitor the PFE Strategic Plan. However, it was agreed that we should include Partnership updates as part of the OSU Forestry and Natural Resources Extension annual partner meeting in 2014 & 2015.

### **For more information, contact:**

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## Partnership for Forestry Education – Strategic Plan – Appendix A

### *Directory of Content Experts for KnowYourForest.org*

The Partnership for Forestry Education has developed the *KnowYourForest.org* website as a primary means of outreach to family forest landowners. The KYF website contains a *Learning Library* where important educational resources are listed for important woodland owner topics. Each topic has an identified *Content Expert* who is responsible for contributing and updating information on that topic. These *Content Experts* will also be involved with other educational efforts on the identified topics.

*Learning Library* topics and associated *Content Experts* include:

- Getting Started – Julie Woodward – [woodward@ofri.org](mailto:woodward@ofri.org)
- What Tree is This? – Tristan Huff – [tristan.huff@oregonstate.edu](mailto:tristan.huff@oregonstate.edu)
- Planting Trees – Paul Oester – [paul.t.oester@oregonstate.edu](mailto:paul.t.oester@oregonstate.edu)
- Thinning My Forest – Glenn Ahrens – [glenn.ahrens@oregonstate.edu](mailto:glenn.ahrens@oregonstate.edu)
- Habitat for Wild Animals – Nicole Strong – [nicole.strong@oregonstate.edu](mailto:nicole.strong@oregonstate.edu)
- Reducing Fire Hazard – Steve Fitzgerald – [stephen.fitzgerald@oregonstate.edu](mailto:stephen.fitzgerald@oregonstate.edu)
- Forest Health – Dave Shaw – [dave.shaw@oregonstate.edu](mailto:dave.shaw@oregonstate.edu)
- Logging and Selling Timber – Steve Bowers – [steve.bowers@oregonstate.edu](mailto:steve.bowers@oregonstate.edu)
- Forest Protection Laws – Paul Adams – [paul.adams@oregonstate.edu](mailto:paul.adams@oregonstate.edu)
- Forest Management Planning – Amy Grotta – [amy.grotta@oregonstate.edu](mailto:amy.grotta@oregonstate.edu)
- Forest Certification – Mike Cloughesy – [cloughesy@ofri.org](mailto:cloughesy@ofri.org)
- Non-timber Forest Products – Eric T. Jones – [etj.oregon@gmail.com](mailto:etj.oregon@gmail.com)
- Weeds and Invasive Plants – Max Bennett – [max.bennett@oregonstate.edu](mailto:max.bennett@oregonstate.edu)