FORESTRY RELATED PROJECT SET-UP GUIDANCE IN THE SWIMS PROGRAM

SWIMS Help Sheet

For Woodland Management Plans, Timber Harvest Plans (THP), and Notice of Intent Forms (NOI) completed by SWCDs

This document will provide guidance to SWCDs on how to set-up the SWIMS program so that Forestry related assistance provided by SWCD's can be captured for reporting to local entities/sponsors and for statewide reports as well.

WOODLAND MANAGEMENT PLANS

In order to make Woodland Management Plans created with SWCD assistance reportable, SWCDs should create in SWIMS a separate "Cooperator Project" for each management plan they're involved with.
Note: As with all Cooperator Projects, "Cooperator" name and address information as well as Parcel/Tract information for the "Cooperator" can be captured if you wish. This information is entered in the SWIMS "**Cooperators**" module.

Cooperator Project Set-up

Step 1: Creating/naming the projects in the Cooperator Projects module.
Use of a consistent naming convention will allow for consistent querying results. For example please use the following type of naming convention:

- Forestry – Smith-Forest Management Plan
- Forestry – CAUV-Jones Forest Management Plan

Putting "Forestry" in the front of each Cooperator Project name, will allow querying to be done on all projects that contain "Forestry" in the project name. This will also group all "Forestry" projects together on your Cooperator Projects list.

Once the Forestry related project is created in the Cooperator Projects module, staff can then charge time against each individual project. Summary reports and queries are then available for each project showing individual employee or entire staff time spent on the project(s).

Step 2: Choosing a "Project Type"
When setting up the project in the Cooperator Projects module, choose "Woodland" from the "Project Type" drop-down list.

Step 3: Choosing a "Program" Type
From the "**Program"** drop-down list, indicate the program that the landowner is participating in. Choose one of the following:

- CAUV
- EQIP

- Ohio Forest Tax Law (OFTL)
- SWCD Program
- Tree Farm

Step 4: Use of the Cooperator Projects "Description" field
Information inserted in the "Description" field (this field is found on the "Details" screen) can be queried. This provides the ability to build reports based on information inserted into the field. For example, SWCDs that are writing woodland management plans for the CAUV Program or something similar, might insert in the Description field, work timelines contained in the Forest Management Plan (see below).

For example, let's assume the management plan you're writing requires the following work to be completed:
2007 - TSI Tract 3
2008 - TSI Tract 1
2010 - Thinning Tract 2
2010 - Harvest Tract 4

If you insert this type of information into the Description field for all Forest Management Plans and you do it consistently, you could then run a query based on a certain year when an activity needs to take place. In the above example, by querying for the year "2007", all projects having work scheduled for completion that year would be listed in the query results and the required follow-up and inspection could then be completed. This will not work for years inserted as "2006-2010 - TSI", each individual year must be entered into the box. So "2006-2010 - TSI", would need to be entered as separate entries in the field – e.g. 2006-TSI, 2007-TSI, 2008-TSI, etc. or TSI 2006 2007 2008 2009 2010.

Step 5: Assigning BMPs to the Cooperator Project
Please assign the proper BMPs to the project. These are found on the BMP list that exists in the Cooperator Projects module, on the BMPs/Activities tab.

- To access the BMP list, from the BMPs/Activities screen, click on the "Add" button, then choose "Woodland Management" from the "Activity Type" drop down list. Then choose the appropriate BMPs from the "BMP/Activity Name" drop down list to assign them to the project.

- To spatially capture and record the work being completed by SWCDs, the BMPs that are assigned to a project are "drawn and saved" in the Cooperator Projects module's GIS interface. Drawing and saving the BMPs in the GIS then allows reporting to be done based on the following attributes: SWCD, Township, 11 digit Watershed, 14 digit Watershed, Ohio "House" District, Ohio "Senate" District, Federal "Congressional" district and Municipality.

- Please draw and save all completed BMPs in the GIS

TIMBER HARVEST PLAN (THP) AND TIMBER HARVEST NOTICE OF INTENT (NOI)

Notice of Intents (NOIs) submitted by Landowners, Loggers or Foresters. Every SWCD in Ohio has the potential to receive THPs and/or Timber Harvest NOIs. The following guidance will walk you through the setup of SWIMS to track the THPs and NOIs that your SWCD receives.

- The **THPs** can be tracked by either creating an "individual" Cooperator Project for each THP received or they can be tracked by creating one "Generic" project for THPs. If you want to be able to track staff time spent on individual THPs, then you'll want to create individual Cooperator Projects for each THP received.
- If tracking staff hrs. spent on individual THPs is not an issue, then you can create a "Generic" project to track them.
- **NOIs** typically require minimal staff time; therefore they can be easily tracked by creating one "Generic" project to track them.

A. Timber Harvest Plan (THP) – tracking with "individual" Cooperator Projects.

For each THP submitted to the SWCD, create a separate project in the SWIMS Cooperator Projects module.

Note: As with all Cooperator Projects "Cooperator" name and address information as well as Parcel/Tract information for the "Cooperator" can be captured if you wish. This information is entered in the SWIMS "**Cooperators**" module.

Step 1: Creating/naming the projects in the Cooperator Projects module.
Use of a consistent naming convention will allow for consistent querying results. For example please use the following type of naming convention: **Forestry - Smith - THP**

Step 2: Choosing a "Project Type"
When setting up the project in the Cooperator Projects module, choose **"Woodland"** from the Project Type drop-down list.

Step 3: Choosing a "Program" Type
From the "**Program"** drop-down list, choose the following option: **Timber Harvest**

Step 4: Use of the Cooperator Projects "Description" field
Information inserted in the "Description" field (this field is found on the "Details" screen) can be queried. This provides the ability to build reports based on information inserted into the fieldRefer to page 1 of the submitted THP form and enter the following names and their relationship to the Timber Harvest in the "Comments" field. For example:

- Landowner Name - John Smith
- Logger \ Logging Company Name - James Miller
- Forester \ Consultant Name - Mark Williams
- Name of Submitter - Wade Garrett

Step 5: Assigning BMP to the Project.
The BMPs are found on the list that exists in the Cooperator Projects module, on the BMPs/Activities tab.

- To access the BMP list, from the BMPs/Activities screen, click on the "Add" button, then choose "Woodland Management" from the "Activity Type" drop down list.

- Then choose "THP (Timber Harvest Plan) Review" to assign it to the project.
- To spatially capture and record the work being completed by SWCDs, the BMPs that are assigned to a project are "drawn and saved" in the Cooperator Projects module's GIS interface. Drawing and saving the BMPs in the GIS then allows reporting to be done based on the following attributes: SWCD, Township, 11 digit Watershed, 14 digit Watershed, Ohio "House" District, Ohio "Senate" District, Federal "Congressional" district and Municipality.
- Please draw and save all completed BMPs in the GIS.

B. Timber Harvest Plan (THP) – tracking with "Generic" Cooperator Project.

Note: As with all Cooperator Projects "Cooperator" name and address information as well as Parcel/Tract information for the "Cooperator" can be captured if you wish. This information is entered in the SWIMS "**Cooperators**" module.

Step 1: Creating/naming the project in the Cooperator Project module.

Create a Cooperator Project named – "_________________ Timber Harvest Plans (THPs)
(Your county name)

Step 2: Choosing a "Project Type"
When setting up the project in the Cooperator Projects module, choose **"Woodland"** from the "Project Type" drop-down list.

Step 3: Choosing a "Program" Type
From the "**Program"** drop-down list, choose the following option: **Timber Harvest**

Step 4: Assigning BMPs to the Project.
After creating the "Timber Harvest Plan" Project as indicated above, please assign the appropriate BMP to the project.

- The BMPs are found on the BMP list that exists in the Cooperator Projects module, on the BMPs/Activities tab.To access the BMP list, from the BMPs/Activities screen, click on the "Add" button, then choose "Woodland Management" from the "Activity Type" drop down list.
- Then choose "THP (Timber Harvest Plan) Review" to assign it to the project.
- To spatially capture and record the work being completed by SWCDs, the BMPs that are assigned to a project are "drawn and saved" in the Cooperator Projects module's GIS interface. Drawing and saving the BMPs in the GIS then allows reporting to be done based on the following attributes: SWCD, Township, 11 digit Watershed, 14 digit Watershed, Ohio "House" District, Ohio "Senate" District, Federal "Congressional" district and Municipality
- Please draw and save all completed BMPs in the GIS.

Step 5: BMP "Comments" Field
After you assign/add the "THP (Timber Harvest Plan) Review" BMP to the project, refer to page 1 of the submitted THP (Timber Harvest Plan) Review form and enter the following names and their relationship to the Timber Harvest in the "Comments" field. For example:

- Landowner Name - John Smith

- Logger \ Logging Company Name - James Miller
- Forester \ Consultant Name - Mark Williams
- Name of Submitter - Wade Garrett

Step 6. In the future, every time your SWCD receives a new Timber Harvest Plan (THP), open up the "Timber Harvest Plan (THP)" Project and simply repeat steps 4 and 5.

C. Timber Harvest Notice of Intent (NOI) - tracking with "Generic" Cooperator Project.

<u>**Note**</u>: As with all Cooperator Projects "Cooperator" name and address information as well as Parcel/Tract information for the "Cooperator" can be captured if you wish. This information is entered in the SWIMS "<u>**Cooperators**</u>" module.

Step 1: Creating/naming the project in the Cooperator Project module.

Create a Cooperator Project named – "__________________ Timber Harvest NOIs".
(Your county name)

Step 2: Choosing a "Project Type"
When setting up the project in the Cooperator Projects module, choose **"Woodland"** from the "Project Type" drop-down list.

Step 3: Choosing a "Program" Type
From the "**Program"** drop-down list, choose the following option: **Timber Harvest**

Step 4: Assigning BMPs to the Project.

- After creating the "Timber Harvest NOI" Project as indicated above, please assign the appropriate BMP to the project.

- The BMPs are found on the BMP list that exists in the Cooperator Projects module, on the BMPs/Activities tab. To access the BMP list, from the BMPs/Activities screen, click on the "Add" button, then choose "Woodland Management" from the "Activity Type" drop down list, then choose <u>NOI (Timber Harvest) Submitted</u>" to assign it to the project.

Step 5. BMP "Comments" Field
After you assign/add the "<u>NOI (Timber Harvest) Submitted</u>" BMP to the project, <u>refer to page 1 of the submitted Timber Harvest NOI form</u> and enter the following names and their relationship to the Timber Harvest in the "Comments" field. For example:

- Landowner Name - John Smith
- Logger \ Logging Company Name - James Miller
- Forester \ Consultant Name - Mark Williams
- Name of Submitter - Wade Garrett

6. In the future, every time your SWCD receives a new Timber Harvest NOI, open up the "Timber Harvest NOI" Project and simply repeat steps 4 and 5.

CHARGING TIME AGAINST FORESTRY PROJECTS - ADDITIONAL INFO

Once Forestry projects are set-up as Cooperator projects, hours can be charged against them. By using the "Comment" field on the Timesheet you can describe the activity or activities that the hours charged against the project represents. Remember, since the Timesheet Comments field is queriable, you can very easily run a query to obtain hours spent doing specific activities for individual Forestry projects or for all Forestry projects. <u>This does require the consistent use of consistent verbiage to describe those activities.</u> This can be easily accomplished by creating a list of activities using the "Timesheet Comments" feature in the Timesheet. A sample list might look like the following:

- Forestry – Logging Complaint Investigation
- Forestry – Mapping
- Forestry – Inventory and Evaluation, aka I & E

Then it's just a matter of staff selecting the appropriate comment for insertion in the "Comment" field. Queries could then be run to show time spent on those particular Forestry activities.

COMMUNICATION NOTES

While working with a particular individual, you have the ability to capture the date and notes for a particular visit or phone call with a landowner/client by using the **<u>Communication Note</u>** feature found in SWIMS. This is a good way to document follow up visits or occasions where additional information/contact was given to the client such as timelines for practice completion.