TIMELINES:
7 Steps for Planning

7 steps for restoration planning: why more time for planning leads to more effective projects.

Setting project timelines is not easy and can often be a source of frustration and headache. A restoration planner must balance many different priorities. Ensuring regulations are met, deliverables are taken care of, and progressive approaches to restoration are considered can feel overwhelming and impossible at times!

As a restoration planner or a contract manager, one big advantage you can give yourself or your contractors is **time**. In fact, in a recent report for the Regional Industry Caribou Collaboration, restoration contractors emphasized time and patience during the restoration planning process as a key consideration for delivering effective programs. The more time that is built into a schedule in advance, the more time there is to make sure it is built for success. At a minimum, Natural Resources Canada recommends a period of 1-1.5 years for the process of site assessment through to planting.

For both restoration planners and contract managers, considering the key steps to planning a restoration program can help ensure enough time is available to develop an effective plan.

1: Initiate the contract-awarding process early.

Restoration can feel like the kind of task that needs immediate action, which can sometimes trick contract managers into designing very short timelines for restoration delivery. However, projects that are delivered on short timelines can end up being rushed and ineffective. There simply isn't enough time to plan an effective program when only three months of planning time is awarded.

During recent interviews with restoration contractors, all those interviewed recommended **increasing the amount of time between awarding a restoration contract and expected contract delivery**. As much as 12-24 months should be considered to allow enough time for the contractor to develop a clear inventory of the site, identify site limiting factors, verify the treatment plan in the field, secure the required permits, and deliver the treatments successfully.

2: Consider adding legacy dispositions to the plan.

Before finalizing the scope of a restoration plan and the areas to be treated, it is worth considering whether there are any legacy dispositions (e.g., well sites, pipelines, and roads) in the region that could also be restored. In the long run, this can increase the overall efficiency of a restoration program since these areas will not need to be addressed through a separate contract in the future.

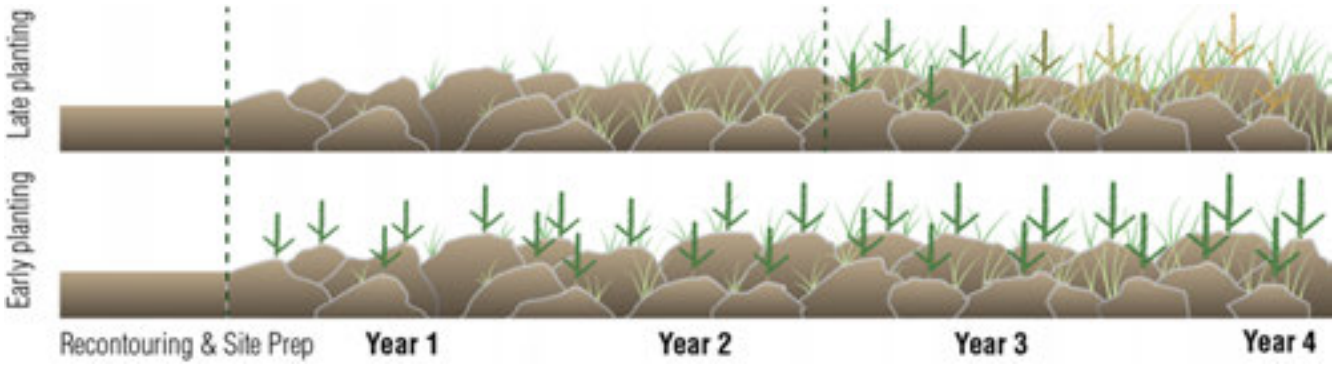
3: Develop an effective treatment plan that addresses site limiting factors.

Site limiting factors are the key reason why seismic lines haven't recovered on their own. In some cases it may be a high water table in a bog, compacted soils on an upland site, or OHV trails that continually set back vegetation recovery. Most companies are using aerial imagery and LiDAR to help inventory their lines, predict the site limiting factors, and propose an initial treatment plan. For more details on this part of the process, check out our post about desktop restoration planning.

4: Order trees and/or seed.

Ordering trees well in advance of the required treatment timeline is essential. Depending on stock type, you may need to order trees as much as **18 months in advance** to ensure that the nursery has the time to produce what you need. Some stock types may not be available at the last minute in the amounts that are required in order to restore your site.

Another important consideration for ordering trees is coordinating planting with site preparation. **The sooner you can plant right after site preparation**, the better off your trees will be as they will not need to compete with existing vegetation.



When trees are planted as soon as possible after site preparation, they can get a headstart over competing vegetation present on the site.

5: Apply for approvals and permits.

The restoration planning process often includes frequent delays in approvals for permits. Building time and expertise into the permitting and approvals process is critical for the delivery of a successful program.

6: Ground-truth your information through site assessments.

LiDAR data was last captured for the Alberta oil sands region at a broad scale in 2007. Unfortunately, this means that some data could be out of date by over ten years. Before deploying crews to restore sites, it is important to verify the areas for treatment through a separate field assessment. By ground-truthing the initial restoration plan, contractors will be better prepared for what work needs to be done. In some cases, the restoration workload might be lessened if some areas have had enough natural regeneration since the last data capture.

Site assessments are also critical for determining what kind of targets you will realistically aim to hit in terms of tree densities, as well as to determine what limiting factors might be present on the site.

7: Make a plan for field-based decisions.

Despite extensive and detailed planning, things can always be different in the field. Working with your team to design a decision-making process that will guide on-the-fly adjustments in the field is important to ensure the original restoration goals are achieved following field implementation of treatments. This plan should be made so that quick changes in the field will still align with broader project goals.

It may seem counter-intuitive, but by adding more time to the front end of the planning process, considerably more time can be saved on the back end. When these seven steps are taken into account and reasonable timelines are set for each piece, restoration planning can become much more effective and efficient.

Want to find out more details about how to construct timelines for effective restoration plans? Check out the Silviculture Toolkit factsheet: A Guide to Regeneration Planning / Guide sur la planification de la régénération.

1 *Pyper, M., & Broadley, K. (2019). Restoration Innovation Roadmap Phase 1: A Synthesis of Lessons Learned to Date. Edmonton, AB: Regional Industry Caribou Collaboration (RICC).*

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