

**USDA Forest Service National Advisory Committee - Implementation of the National Forest System
Land Management Planning Rule
October 5-8, 2015
Sheraton Phoenix Airport Hotel
Tempe, Arizona**

Introduction

The National Advisory Committee for Implementation of the National Forest System Land Management Planning Rule (the Committee) held its fourth meeting of the new charter from October 5-8, 2015, in Tempe, AZ.

Objectives

The objectives of the meeting were to update the Committee on working group progress; engage with key US Forest Service personnel and other stakeholders active in the Land Management Plan Revision processes in Region 3 and with other early adopter forests; review and discuss the Francis Marion National Forest Proposed Plan; and agree to Strategic Direction and Work Plan for FACA 2016.

Meeting Participants

Committee members present: Mike Anderson, Susan Jane Brown, Robert Cope, James Magagna, Joan May, Peter Nelson, Martin Nie, Candice Price, Greg Schaefer, Angela Sondena, Thomas Troxel, Ray Vaughan, Lindsay Warness,

Committee members absent: William Barquin, Adam Cramer, Daniel Dessecker, Russ Ehnes, Rodney Stokes, Chris Topik, Vickie Roberts

Agency Staff: Chris French-DFO, Ann Acheson, Meryl Harrell, Region 3 - Bob Davis, Matt Turner, Elaine Kohrman, and Neil Bosworth

Facilitators: Kathleen Rutherford and Pam Motley

Agreements and Actions

1. ***Assessment Recommendations*** – ***The Committee agreed to the draft ‘080615_Clean_FACA Letter on Assessments’ as presented with the minor edits discussed in the meeting. The revised letter will be conveyed to the Secretary of Agriculture and Chief of the Forest Service by the Committee Co-Chairs.***
2. ***Draft Evaluation Checklist*** – ***The Committee agreed to several minor edits to ‘v5.2015 Evaluation Checklist 1005_2015’ as discussed in the meeting. A sub group will continue to refine the document, taking into account suggestions from Region 3.***
3. ***Citizens’ and Government Guides*** – ***The Committee accepted the proposed texts (‘CitizensGuideEditstoSonja09102015’ and ‘GovGuideEditstoSonja’) with minor edits to the Grazing Section of the Citizens’ Guide as discussed in the meeting. Members were also invited to review the guide texts and submit edits during the meeting. Edits received will be incorporated into the text and the guides will be sent to the full Committee for final review and then to the USDA Office of Communications for review.***
 - a. ***Layout:*** ***The Committee submitted comments on the layout of the guides. The comments will be taken into consideration and the layouts will be finalized.***

- b. **Info-graphics: The Committee submitted comments to the draft info-graphics. The info-graphics will be edited accordingly and a second draft will be released for Committee review.***
- 4. **Region 3 will share their guidance document on the wilderness process with the Committee upon completion.***
 - 5. **The agency will give an update on the planning video and turnover recommendations at the January 2016 meeting.***
 - 6. **A learning call will be scheduled between the Francis Marion NF and the sub-committee to continue the dialogue on the draft forest plan.***
 - 7. **The Committee agreed to a 2016 meeting schedule: January 14/15 – Sacramento, CA; March 8/9 – Charleston, SC; May 10/11 - Grey Towers, PA; July 12/13 – Portland, OR; Aug 30-Sept 1 - DC (End of Charter)***

Introductions and Updates

To open the meeting, the committee recognized Lorenzo Valdez' contributions to the Committee followed by a moment of silence. The agency noted that the Forest Service has been implementing the 2012 Rule for three years and is starting to see what is working and what challenges exist. This is the critical time for the Committee to address several key issues. The agency is in the process of extending the Committee's charter for another two year term. Several members shared that they are involved with individual plan revisions on various early and mid-adopter forests.

Meeting objectives and committee business

The Committee working groups gave updates on their progress since the last meeting on April 28-30, 2015. The groups have laid a great foundation for the Committee to now address several key 'gnarly' issues that the agency is facing. Several members expressed interest in continuing to dialogue about agency turnover, noting that there is a need for national direction on how to implement the Rule in a manner that reduces the negative effects of transitions.

Draft Assessment Recommendations - The Committee agreed to the draft '080615_Clean_FACA Letter on Assessments' as presented with the minor edits discussed in the meeting. The revised letter will be conveyed to the Secretary of Agriculture and Chief of the Forest Service by the Committee Co-Chairs on behalf of the Committee.

Draft Evaluation Checklist - The Committee suggested several minor edits be made to the 'v5.2015 Evaluation Checklist 1005_2015'. A sub group will continue to refine the document, taking into account suggestions from Region 3. It was also suggested that the document include a more explicit cover letter explaining the rationale, purpose, scope and audience of the recommendations. In addition, the agency requested that the Committee pursue an evaluation checklist that could be used by Regions and forests during the planning process as well.

Citizens' and Government Guides – Text: The Committee accepted the proposed texts (*CitizensGuideEditstoSonja09102015* and *GovGuideEditstoSonja*) with minor edits to the Grazing Section of the Citizens' Guide as discussed in the meeting. Members were also invited to review the guide texts and submit edits during the meeting. Edits received will be incorporated into the text and the guides

will be sent to the full Committee for final review and then to the USDA Office of Communications for review. The guides are expected to be finalized by the end of November. Layout: The Committee submitted comments on the layout of the guides. The comments will be taken into consideration and the layouts will be finalized. Info-graphics: The Committee submitted comments to the draft info-graphics. The info-graphics will be edited accordingly and a second draft will be released for Committee review. The Committee and agency will need to discuss how the Citizens' and Government Guides will be maintained once they have been published.

USFS Region 3 Panel: Focusing on Feedback Loop, Public Engagement and Wilderness – (Region 3 participants - Bob Davis, Matt Turner, Elaine Kohrman, and Neil Bosworth)

The Regional Office (RO), Tonto National Forest and Cibola National Forest presented updates on lessons they are learning with respect to implementation of the 2012 Rule. Innovative practices highlighted by the region include: the RO's use of an 18-member standing Regional Planning Team referred to as the 'A Team' and Regional Social-Economic Team referred to as the 'Z Team'; an NRV assessment for the region completed by The Nature Conservancy; socio-economic assessments for the region completed by the University of Arizona and the University of New Mexico; assistance from the Research Stations to develop desired conditions for each major vegetation type; and the use of monthly calls and quarterly meetings between the RO and revision forests to ensure lessons being learned are shared across forests.

The Tonto NF noted the unique urban setting of the forest, with 5 million people living adjacent. This creates opportunities for partner assistance in providing data, analysis, and report writing. Challenges include reaching forest users, low income and minority populations; continuing to implement other forest activities during planning; engaging urban counties in the planning effort; and maintaining momentum and keeping stakeholders engaged throughout the process.

The Cibola NF noted that the forest is split into six separate units with sky island geographies. This configuration has added complexity to the planning process. The forest has developed Landscape Teams, made up of 35 entities with cooperating agency status, to assist with the planning effort. The Teams will help draft the forest plan "in their words", with less technical language; the goal is to craft a plan that is a "social contract" that will be used and supported by partners and communities. Additional innovative practices include: an institutionalized transition plan that ensures that the plan will be upheld through changes in line officer personnel; engaging college students by hosting an interagency summit to discuss climate change, wilderness and sustainability; a plan to host a Leaders as Conveners session for partners to build capacity; and the use of a public participatory process to encourage input in the wilderness process. Challenges noted include continuing to implement other forest activities during planning; attempting to keep to the timeline; and funding the planning effort (50% of the planning funds must be drawn from other forest areas).

The RO has garnered several lessons learned with respect to wilderness including that the timing of the steps is important and a need for more discussion with the public on the process and the definition of 'substantially noticeable' prior to releasing inventory maps. The RO is currently drafting a guidance document on the wilderness process that will be shared with the Committee upon completion.

Readout on and discussion of key committee member reviews of the Francis Marion Proposed Plan and DEIS (*Region 8 participants- via telephone: Paul Arndt, Mary Morrison, and Larry Hayden*)

Committee subgroup members shared initial impressions of the draft forest plan and DEIS. Overall the subgroup stated that the draft plan was an excellent first effort to implement the new Rule, is easy to read and will serve as a good model for other forests. Additional positive aspects of the plan noted include: use of a matrix in the monitoring plan; use of Resource Integration Zones to help implement ecological, economic and social sustainability; excellent quality of inventory data; good integration of fire management; and well explained sections on: what a plan is and does, longleaf pine restoration needs, tree age classes and harvest, the wilderness and wild and scenic river processes, and the uniqueness of the forest and issues it is facing.

Areas for potential improvement include a need for: more information on socio-economic factors and how the plan fits into the larger longleaf restoration strategy; a more explicit explanation of the rationale of only drafting two alternatives; more specific and enforceable standards and guidelines; a clearer rationale for the desired conditions; greater integration of Endangered Species Act plans; a clearer link between desired conditions and the monitoring plan, with monitoring questions that affect management; more information on the effects analysis for determining Species of Conservation Concern; a better description of fiscal capability; and more socio-economic monitoring questions.

The Committee agreed that it will be useful for subgroups to continue to review draft forest plans as they are released, focusing on process and policy issues. This will not be a consensus-building exercise and different members may review different sections of plans. As more plans are released, a comparative analysis may daylight areas in need of national guidance. A subsequent learning call will be scheduled between the Francis Marion NF and the subgroup to continue the dialogue.

Revisiting Early Adopter Experience to Date (*Participants from Regions 1, 3, 5, 8 and 10 - via conference call*)

Regions 1, 3, 5, 8 and 10 gave updates on their progress and/or challenges experienced since the Committee visited with revision forests. Agency-highlighted issues include: Fire –the need to develop desired conditions that address fire in an all lands approach and allow for appropriate responses to wildland fire based on management zones. Public engagement – the importance of maintaining communication with the public so that the agency does not go into a ‘black box’ during NEPA; the need to share explicit and understandable information on processes and methodologies for SCCs, wild and scenic rivers and wilderness up front; encouraging stakeholders to sponsor their own forums to address difficult issues; addressing the fact that both the agency and public are oftentimes uncomfortable with the release of draft documents and maps and the unintended consequences that can result; the need to ensure that stakeholders’ comments are reflected in the assessment and draft plan; and the need to write documents in plain language so that publics can understand and feel ownership in the process. Timelines – the struggle to meet timelines while creating opportunities for robust public engagement. Fiscal capability – finding the balance between desired conditions that are realistically achievable within a forest’s fiscal capabilities and what is ecologically needed. Wilderness – the need for more clear definitions on ‘substantially noticeable’, ‘reasonably foreseeable actions’ and ‘unconfined recreation’; how to address areas that reflect wilderness characteristics but are at risk of catastrophic fire because of forest health issues; a need to correct Section 71.4 in the directives; in Alaska - more clarification on

how Wilderness Study Areas should be managed and how to balance Region 10 policies, ANILKA, Wilderness regulations and the 2012 Rule.

Dialogue with Region 5 on potential for regional planning approach (*Region 5 participants - Bernie Gyant and Al Olsen*)

Region 5 presented a proposal to implement regional planning efforts. The benefits of such an approach include: the opportunity to take an all lands approach that more appropriately addresses issues like fire, at-risk species and Species of Conservation Concern, monitoring, water, connectivity and wilderness; more effective use of limited funds, agency capacity and skill sets; reduction of the negative effects of agency turnover; the ability to stick to planning timeframes by commencing pre-work on timber, wild and scenic rivers, wilderness and fire risk pre assessment; regional science assessments and a more rapid assimilation of the 2012 Rule. The Committee will continue to dialogue with the agency on the costs and benefits of regional planning approaches.

Translating Inputs into Strategic Directions for the Committee

The agency recommended the Committee focus on three priority areas for 2016: SCCs, wilderness, standards and guidelines/monitoring/adaptive management. These priority issues address the agency's needs, will help highlight any blind spots the agency may have and will help to keep the Rule stable. The agency also requested that the Committee assess implementation of the rule: Are the differences in implementation and interpretation that are being seen across the revision forests due to a lack of capacity, misinterpretation, or the appropriate amount of flexibility intended within the Rule? What is working? What isn't working?

Committee advice may include white papers highlighting BMPs or issues, dialogue with agency, review and edit of draft documents, and/or consensus recommendations. Each Committee meeting will focus on a few key issues. Working groups or subgroups will be assigned to each priority issue and draft work plans will be finalized. The commencement of the working groups will be staggered.

The Committee agreed to initiate work on the following priority topics:

- SCCs – There is a need for clarification around selection and public engagement.
- Wilderness – There is a need for clarification around interpretation of the directives and public engagement.
- Standards and Guidelines/Monitoring/Adaptive Management – There is a need for clarification on the use of monitoring/adaptive management to test the effectiveness of plan components. There is a need to address the tension between the potential for plans to 1) not have adequate S&Gs leading to a lack of accountability and inefficiencies at the project level vs. 2) have excessive S&Gs that limit flexibility and a forest's ability to achieve desired conditions.
- Complete Outreach Material: The outreach work group will continue to work on finalizing the Citizens' and Government Guides and additional outreach material.

The Committee identified additional topics that working groups or sub groups will address in the next ten months.

- Fire/All Lands – There is a need for greater integration of the Cohesive Strategy and CWPPS in forest plans. BMPs on how to integrate fire in forest plans and how to best coordinate with partners.
- Fiscal Capability - There is a need for guidance with respect to fiscal capability to implement and maintain adaptive management. There is a need to address fiscal constraints on planning for desired conditions and outputs.
- Oversight Process/Evaluation Checklist – There is a need to give input into the agency's development of a national oversight process and to develop evaluation checklists for the WO, regions and forests to use post planning and also for real time evaluation.
- Public Engagement – There is a need to address the tension between burn out among some public while other want more engagement. How can the agency better engage youth in planning efforts? What does meaningful, transparent public engagement look like?
- Turnover – How can the agency implement the 2012 Rule in a manner that reduces the negative effects of agency turnover? Are there ways for the agency to reduce turnover?
- Objections – How can the agency best address the different objection processes in use?
- Determining Which Forests are Ready for Revision/Amendment – Should the agency implement bioregional vs single region planning? What are the benefits/challenges/trade-offs? What preparation (training, staffing, budgeting, etc) needs to be in place prior to forests initiating revisions? How are forests disseminating lesson learned to new forests? What criteria should forests use to determine between an amendment or revision?

2016 FACA Meeting Schedule

- January 14/15 – Sacramento, CA
- March 8/9 – Charleston, SC
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