

**USDA Forest Service National Advisory Committee for Implementation of the National Forest System  
Land Management Planning Rule  
Holiday Inn Charleston Historic Downtown  
425 Meeting Street, Charleston, SC 29403  
May 10-12, 2016**

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### **Introduction**

The National Advisory Committee for Implementation of the 2012 National Forest System Land Management Planning Rule (the Committee) held its fifteenth meeting from May 10-12, 2016 in Charleston, SC.

### **Objectives**

The objectives of the meeting were to dialogue with agency leadership to explore key challenges and innovative approaches to gaining efficiencies in planning; update the Committee on work group progress; discuss the amendment process; and continue to implement and refine the 2016 Work Plan.

### **Meeting Participants**

- Committee members present: Mike Anderson, Susan Jane Brown, Robert Cope, James Magagna, Peter Nelson, Martin Nie, Thomas Troxel, Lindsay Warness, William Barquin, Chris Topik, Joan May, Adam Cramer, Daniel Dessecker, Angela Sondena, Greg Schaefer and Ray Vaughan
- Committee members absent: Vickie Roberts, Rodney Stokes, Candice Price, Russ Ehnes
- Agency Staff: Chris French-Designated Federal Official (DFO), Meryl Harrell, Brian Ferebee, John Rupe, Jamie Barbour, Peter Gaulke, Regis Terney, Wendy Zirngibl, Sue Spear, Liz Tomley, Heidi Trexel, Earl Stewart, Paul Arndt, Jerome Thomas, Maria Lisowski
- Facilitators: Kathleen Rutherford and Pam Motley

### **Agreements and Actions –**

- 1. *The Committee agreed to the final recommendations on public engagement within the wilderness evaluation process. The recommendations, with cover letter, will be conveyed to agency leadership.***
- 2. *The Committee agreed to final ‘observations’ on public engagement. The observations will be shared with the DFO via memo.***
- 3. *The Committee formed an amendment work group to address the current ambiguity within the 2012 rule text with respect to amending 1982 plans.***
- 4. *The Adaptive Management and SCC work groups will schedule a call with region 8 to learn more about the Easy Tool.***
- 5. *The Adaptive Management work group will schedule a call with the USFS to discuss the monitoring transition.***
- 6. *The Committee will send three representatives to participate in the up-coming USFS Lessons Learned Workshop in Fort Collins, CO on May 17-19.***
- 7. *The next Committee meeting will be held in Portland, OR on July 12-14, 2016.***

### **Designated Federal Official/Committee Co-Chair Opening Remarks**

Co-Chair Susan Jane Brown welcomed the members. The DFO welcomed the group and noted that the agency is at a critical point with respect to implementation of the rule to capture lessons being learned

and make course corrections if needed. The Committee will continue to be a key part of this learning and adapting. Agency leadership is interested in continuing to explore the concepts of collective leadership and co-management. In addition, the agency asked the Committee to help identify innovations and inconsistencies within implementation; the goal is to create stability around the intent of the rule. In particular, the agency is interested in continuing to work with the Committee on Species of Conservation Concern (SCC), identifying what forests need to have in place prior to commencing revisions and how to effectively integrate fire and restoration into planning.

Jerome Thomas, Region 8 Deputy Regional Forester, welcomed the Committee and provided background context. The region includes primarily fragmented units, many near urban centers, across thirteen states, ranging from the mountains to the sea. The region frequently experiences storm events (tornados, hurricanes, high winds) that affect areas for decades. Many units are working to restore forests within range-wide conservation strategies.

### **Committee member introductions and updates-key observations from 2012 Rule Implementation**

Committee members shared personal observations on implementation. Several noted that the agency is at a key juncture, awaiting the release of several draft plans. This is an important time for the Committee and agency to work together. Areas of interest for continued dialogue include: the monitoring transition, importance of partnerships and cooperating agencies, amendment process, adaptive management framework, turnover, and SCCs. Members have shared the links to the Citizens' and Government Guides with stakeholders. Both guides have been well received. The Committee is keen to finalize the guides to allow for greater distribution.

### **Standing Business**

Wilderness – After reviewing and commenting on a draft, the Committee agreed to final recommendations on public engagement in the wilderness evaluation process. The recommendations, with cover letter, will be conveyed to agency leadership. In addition, the wilderness work group shared a draft list of promising practices with the group. Committee members are encouraged to comment on and add to the list. It will be conveyed to agency leadership in September 2016.

Outreach – After reviewing and commenting on a draft, the Committee agreed to final recommendations on 'observations' on public engagement. The observations will be shared with the DFO via memo.

### **Report out from all work groups**

Wilderness – Working with the USFS on a public FAQ sheet for Committee review at the July meeting. The work group will also provide input on region 4's outreach materials. The Committee would like to see these materials linked to the final Citizens' Guide.

Adaptive Management – Completed a working draft rubric for notes and observations on plan components used in draft plans. The goal is to generate discussion and learning between the Committee and agency and to build an evidence-base that will allow the Committee to develop recommendations on adaptive management/monitoring/plan components. The Committee will exercise the mantra '*learn locally, act nationally*'; the Committee will not grade individual plans. The

information will also inform the Plan Component Workshop with RPDs tentatively planned for August 29, 2016. To test the tool, a sub group reviewed the draft Francis Marion NF plan. Additional draft plans will be reviewed using the tool. Work group members will share observations via work group calls.

Species of Conservation Concern – In dialogue with the agency on how to best proceed in joint problem-solving. The WO is currently addressing several issues in need of rapid response. The agency also plans to draft several white papers to address additional issues day-lighted by the USFS SCC Enquiry and the Committee’s SCC Stakeholder Summary. The Committee will have the opportunity to help develop and comment on whitepapers. The agency also requested the Committee to take a deeper dive on several larger policy issues like the definitions of ‘substantial concern’ and ‘known to occur’.

Objections – Reviewed and commented on draft 218 and 219 brochures and identified favorable aspects of the two processes. The group will comment on the draft 218/219 comparison brochure and will host telephone conversations with objectors in late May. The key themes expressed by stakeholders will be summarized in a briefing report; the report will be shared with stakeholder participants, the agency and Committee.

Fire – Currently working on a draft checklist to encourage greater integration of the Cohesive Strategy into forest planning. This checklist will be used to develop recommendations. The group will have a draft for Committee review at the July 2016 meeting.

### **Discussion on the Amendment Process and Tongass Amendment**

The Committee and agency discussed the need for forests to efficiently and effectively amend 1982 plans with the 2012 rule; amendments are a key part of the adaptive management framework on which the rule is based. While the intent of the 2012 rule is clear, the current rule text is imprecise. This ambiguity may lead to unintended consequences and ultimately destabilize the 2012 rule if not addressed. There are many fundamental differences between the 1982 and 2012 rule that create complexity. The 2012 rule is based on the interconnectedness of resources. Yet, to successfully amend plans, forests need a clear process that allows them to revise one component of a plan without initiating a ‘domino chain’ (i.e. how do you pull one thread without affecting the entire tapestry of the plan?). At the same time, changes to the plan cannot be contrary to the intent of the rule. The current rule language could lead a responsible official to disregard 2012 regulations while also removing 1982 regulations (i.e. ‘cherry picking’).

Greater clarity and guidance is needed to resolve several aspects of the process: 1) How do you amend one part of an 1982 plan without triggering all aspects of the 2012 rule? 2) How do you ensure that the intent and integrity of either the 1982 or 2012 rule requirements are preserved? 3) Who has the discretion to determine what parts of the 2012 rule need to be addressed in an amendment? 4) What is the appropriate scope and scale of an amendment?

The agency provided the Committee with proposed language for a technical correction to the rule as a starting point to address the issue; the end of May is the deadline to submit this correction. In addition, the agency requested that the Committee take a deeper dive on the larger amendment issue over the next several months with the goal of developing recommendations. The Committee accepted the

request and interested members volunteered to serve on a work group. The group discussed the Tongass NF draft amendment as it relates to the larger amendment process. Committee members expressed concern over the scope and scale of the amendment.

### **Looking into the efficacy of Public Engagement and Outreach to Urban Populations with the Francis Marion National Forest**

Mary Morrison, Francis-Marion NF Forest Planner; Sam Cook and Jennie Stephens, Center for Heirs' Property Preservation; and Bill Wallace, Manager, Town of Awendaw, joined the Committee for a conversation on the efficacy of the forest's public engagement. The forest has a unique role and relationship with several adjacent (and in-holding) communities and landowners. The plan addresses many of these aspects by: 1) identifying within the plan objectives the need to provide connections and contribute to social and economic sustainability by supporting ecotourism, 2) reducing the risk of largescale wildfire and 3) providing opportunities for subsistence. The forest is continuing to explore effective means to engage underserved communities.

Sam Cook and Jennie Stephens provided background on the Center for Heirs' Property Preservation's work with local landowners. Both have been engaged in fostering greater landowner participation in the planning process. Historically many of these landowners were underserved by the agency and; therefore, lacked trust. The Center works with the forest to create opportunities for stakeholders to provide input in the process. Bill Wallace provided a historical context for the relationship between the Town of Awendaw and the forest. The town's economy is based on tourism. The town appreciates the opportunity afforded by the forest and the rule to have a seat at the table and provide input into the plan. As a result, the forest has included within the plan a proposal to develop a trail system.

The panelists offered several suggestions for improved public outreach including: recognize the importance of partners in the process; approach leaders of social organizations to assist with outreach; create community advocates; host meetings on weekends and evenings to allow working people to attend; provide different formats for meetings, including world cafés to allow for greater input and dialogue; *'become the people you want to receive input from'*; clearly articulate why the forest is seeking input and how it will be used; start conversations by addressing the why (wildfire risk, subsistence, recreation), then pivot to the plan revision; provide funding to communities to support outreach and engagement; listen to stakeholders (rather than always presenting information); lose the Forest Service uniforms and the badges at public meetings; ensure that planning teams include outreach expertise; continually pause within the process and assess if you are getting the information you need –If not, change tacks. The forest balanced local and national input on the draft plan by basing decisions on Best Available Science (BAS) and creating a transparent process. As a result of comments received on the draft plan, the forest has made several edits to the final plan including: greater documentation of the rationale used to determine SCCs, editing the plan to make it more readable and streamlined, addressing adaptive management and monitoring to a greater degree and hosting workshops on sea level rise. One intent of the rule is to improve environmental justice outcomes. The forest continues to struggle to identify and address subsistence needs and engage underserved and minority communities. The forest requested that the Committee explore: 1) What steps should a forest take to be in a good position to start the plan revision? 2) How can forests effectively reach out to youth within current

agency capacity and limitations on the use of social media? 3) How can forests keep the public engaged between draft and final plans while not violating NEPA regulations?

### **Discussion on Adaptive Management and Monitoring with the Francis Marion National Forest**

Mary Morrison; Emrys Treasure, Biological Scientist with the Southern Research Station (via telephone); and Larry Hayden, Retired Forest Service and contractor on the plan revision, joined the Committee for a conversation on adaptive management and monitoring. Mr. Hayden outlined several observations on developing an effective monitoring plan including: start setting up monitoring program early, including identifying risks, uncertainties, assumptions and strategies; prioritize monitoring – focus on outcomes on the landscape scale (desired conditions and objectives); establish thresholds and triggers to take action (response); develop focused criteria for developing the monitoring program and plan objectives; format questions based on the eight rule requirements; and modify monitoring plan continuously and build over time. Limits to developing an adaptive management framework include the agency's capacity to innovate, fiscal capability and the inability to modify existing broad scale monitoring.

The Francis Marion NF plans to establish baseline data on populations of focal species within the first two-year period. The largest areas of uncertainty in the plan include: the conditions needed to support SCCs, climate change, hydrology, and how to adapt to changing technology moving forward. The plan includes triggers to tie monitoring to decision making. It was useful to have district level representatives on the planning team; it is important to get district input early and often to ensure that the plan is implementable (i.e. the forest can work towards and achieve desired conditions). Prescribed fire is key to reaching/maintaining desired conditions; the plan must consider adaptive management strategies to address policy issues, fiscal capability and urbanization factors that may limit burning. The success of the monitoring plan will depend on participation from partners. Broad scale monitoring will address economic and social sustainability of the region but there is a need to dive deeper at the forest-level. The forest is interested in gaining a better understanding of how forest conditions affect tourism. The region employed the Easy Tool to document and assess information on ecological integrity and SCCs. The Committee will schedule a call with region 8 to learn more about the Easy Tool.

Committee comments included: there is a need for a transparent process, including sharing rationale and BASI with stakeholders; adaptive management should not be used as an excuse for 'punting' on important issues; it is important to set up controls; it is fundamental to identify the ecological conditions needed for SCCs in the assessment; it would be useful for the plan to use the two-tiered approach for all resources (beyond fire and timber harvest); and 'If, then' statements may alleviate the tension between flexibility and accountability.

### **Dialogue with Agency regarding observations from implementation and innovative approaches to gaining efficiencies in planning**

The agency's view of success with respect to the rule includes: efficiency (able to implement in 3-4 years); content/quality (sustainability, BASI, plan components); and effectiveness (public engagement, transparent, adaptive, all lands). The agency has a desire to embrace the ideas of co-management and collective leadership, moving beyond the historical views of partnership. The Committee will continue to play a key role in navigating this critical work. Committee observations included: the 2012 rule offers a tremendous opportunity for the agency to shine –this should be the starting point of outreach and engagement; there is a need to address public misconceptions around co-management; co-management means stakeholders feeling ownership in the planning process and final plan; the rule is an

upward spiral for the agency –when decisions are based on BASI and have solid public support, the agency will prevail; public access to rational and defensible decisions will reduce conflict; partnerships with monitoring will help the agency gain support for collective leadership and co-management; the goal within implementation should be for stakeholders to ask ‘how are we doing?’ because they have been a part of plan development; the rule provides a new era in which tribal and indigenous people can have a say; effective public engagement is key to the success of the rule – the agency needs to reach out to professional marketing and advertising firms to develop innovative ways to engage the public; there is a need to better support employees to foster a passion for planning and management; the agency must use laymen’s terms so the public can understand complex issues; and the agency can have both consistency and clarity in the process while also fostering innovation at the local level and within implementation. The rule is an opportunity for the agency to reinvent relationships. To do this, the agency must: provide work force training on effective social engagement; address turnover and short tenures; become their own cheerleaders by effectively expressing the importance and legacy of our national forests; find champions within communities; ask for help; and view engagement as an opportunity for dialogue (don’t cringe when stakeholders call with questions and needs).

#### **Update on the USFS Lessons Learned Workshop**

The Committee will send three representatives to participate in the up-coming USFS Lessons Learned Workshop in Fort Collins, CO on May 17-19. The event is a great opportunity to functionalize the working relationship between Committee and USFS to identify and solve problems. The Committee participants will capture the discussions and outcomes of the workshop and share with the full Committee on a learning call.

#### **Transition to the new Committee Charter**

The agency will post a call for applications for the new Committee charter in the Federal register notice. Committee members interested in applying will have 45 days to apply. For those not reapplying, the agency asks that these members assist with outreach to new potential candidates.

#### **Memo to the Chief**

The co-chairs will draft a memo highlighting the key themes discussed in this meeting. Topics will include: challenges facing the agency; amendments; the plan component workshop; the Chief’s challenge (including co-management and collective leadership); the monitoring transition; support for region 4’s wilderness outreach products; a thank you to the Francis Marion NF on first plan with the 2012 rule, the field trip and partner presentations; the need for the agency to clarify public engagement opportunities during the NEPA process; a forecast on larger SCC policy issues that the Committee will be addressing; and support of the USFS’ Lessons Learned Workshop.

#### **Next Meeting**

The next Committee meeting will be held in Portland, OR on July 12-14, 2016.