

**National Advisory Committee for  
Implementation of the National  
Forest System Land Management  
Planning Rule**

- Mike Anderson, *The Wilderness Society*
- William Barquin, *Kootenai Tribe of Idaho*
- Susan Jane Brown, *Blue Mountains Forest Partners*
- Robert Cope, *Lemhi County Commissioner, ID (Ret.)*
- Adam Cramer, *Outdoor Alliance*
- Daniel Dessecker, *Ruffed Grouse Society*
- Russ Ehnes, *National Off-Highway Vehicle Conservation Council*
- James Magagna, *Wyoming Stock Growers Association*
- Joan May, *San Miguel County Commissioner, CO*
- Peter Nelson, *Defenders of Wildlife*
- Martin Nie, *University of Montana*
- Candice Price, *Urban American Outdoors*
- Vickie Roberts, *Shelton Roberts Properties*
- Greg Schaefer, *Arch Coal, Inc.*
- Angela Sondenaa, *Nez Perce Tribe*
- Rodney Stokes, *Michigan Governor's Office (Ret.)*
- Christopher Topik, *The Nature Conservancy*
- Thomas Troxel, *Intermountain Forest Association*
- Lorenzo Valdez, *Rio Arriba County, NM*
- Ray Vaughan, *Noted Author and Raconteur*
- Lindsay Warness, *Boise Cascade Company*

March 13, 2015

Tom Vilsack  
Secretary, Department of Agriculture  
1400 Independence Ave., SW  
Washington, D.C. 20250

Thomas L. Tidwell  
Chief, U.S. Forest Service  
1400 Independence Ave., SW  
Washington, D.C. 20250-0003

Dear Secretary Vilsack and Chief Tidwell:

The National Advisory Committee for Implementation of the National Forest System Land Management Planning Rule (hereafter Committee) is pleased to offer our recommendations on the ***Transition Process for Forest Service Leadership and Forest Planning Team Members***. Based on the Committee's learning over the past two years, we have concluded that in order for the 2012 Planning Rule to be successful, there is a very pressing need to improve transitions between outgoing personnel and incoming personnel who will assume the responsibility for working directly with these partners and publics.

The Committee established a Turnover Workgroup to gather information on agency turnover and effective handover techniques. Consensus recommendations were then developed using the 2006 Handover Memo as a starting place, which was originally developed in 2006 by the National Leadership Team (NLT) on recommendation by the Collaboration Action Team, a national-level group of governmental and non-governmental organizations. Based on our learning, the Handover Memo should contain information about relationships with partners, collaborative efforts underway, commitments that have been made, and any work agreements or procedures that partners are using with the agency/unit. The Handover Memo should be completed by the outgoing leaders and planning team members prior to their departure and addressed to the incoming personnel. It should also be copied to the outgoing leader's supervisor and key subordinate staff on the unit, as well as external partners as appropriate.

Given the increased importance and prevalence of collaboration involving the Forest Service and the public, it is the Committee's view that the time is ripe to update and redistribute the Handover Memo to those forests currently undergoing or anticipating initiation of the plan revision process; and we believe the Memo should also be used by any National Forest unit involved in collaboration and extensive public engagement. Specifically, the Committee recommends that the agency:

1. Distribute the Handover Memo to Forest Supervisors, District Rangers, Research Program Leaders, State and Private Forestry field representatives,

Forest Plan Interdisciplinary Team members, resource specialists that are integral to important planning efforts such as forest plan revision or large landscape restoration projects, *as well as any other Forest Service personnel who work extensively with partner and cooperator networks*. The Committee requests assistance from the agency leadership, National Partnership Office, and Regional Planning staff in distributing and monitoring the implementation of the Handover Memo.

2. Prior to initiating the plan revision process, forests should develop and use a “Roles and Responsibilities” document for the planning team that clearly outlines the responsibilities for each position. An example is included with this transmittal letter.
3. Prior to initiating the plan revision process, forests should develop and continually update a spreadsheet/database of current and past agreements (both written and verbal) to ensure a history of public engagement and agreements is maintained. Forests should also maintain and update a comprehensive list of other important contacts who may not be close partners and collaborators. Maintenance of the database and contact list should be assigned to a member of the planning team, and should be made available to the public as appropriate.
4. The Committee requests a progress report from the Forest Service in July 2015 and every six months thereafter that discusses how the Handover Memo and Roles and Responsibilities document have been used, lessons learned, and any early assessments of whether the use of these or similar document has improved personnel transitions and sustained relationships with collaborators and partners.

An example of the Handover Memo is enclosed for your reference as well as Region 5’s “Forest Plan Roles and Responsibilities.” We are also transmitting to you an example of how the Handover Memo has been used on one forest in Region 4 in the past, and request that you make this document and other similar resources available at the National Partnership Office.

Our ability to solve natural resource related problems over the long run depends on the quality of long-term relationships. We ask that the agency leadership support the use of these important tools for ensuring improved transitions between outgoing and incoming leaders, planning teams, and the communities they serve. We believe that successful implementation of the 2012 Planning Rule hinges on maintaining and fostering productive partnerships with the public, and that this advice will assist in achieving that goal.

Respectfully submitted on behalf of the National Advisory Committee,

Susan Jane Brown  
Co-Chair



Rodney Stokes  
Co-Chair



Attachments:

APPENDIX 1- Handover Memo Template

APPENDIX 2- Sample Memo “Pete\_Handover\_Memo\_1-3-06”

APPENDIX 3- Region 5’s “Final DEIS and Forest Plan Roles and Responsibilities”