

Objectives

Learn from the California early adopter forests and use this information to determine next steps for the committee informing the implementation of the 2012 Planning Rule (the rule).

Action Items & Next Steps

- Schedule calls for the three work groups established in this meeting (Facilitating Government Engagement Guide, Partnership Guide, and Outreach (Citizen Guide and Outreach Slides)
- Kathleen and Jonathan will collect committee observations from the interactions with R5. Key observations will be collected and used to inform future advice.
- Chris French will distribute the 4-year monitoring transition Q&A document to the full Committee.
- Coordinate learning call for the government participation work group about how intergovernmental relationships work in Eastern forests.
- The committee also agreed to discuss and recommend a process for determining priority questions to address in broad scale monitoring during the May meeting.

MEETING SUMMARY

Present

Committee Members

Mike Anderson (The Wilderness Society), William Barquin (Kootenai Tribe of ID), Susan Jane Brown (Western Environmental Law Center), William Covington (Northern Arizona University), Adam Cramer (Outdoor Alliance), Daniel Dessecker (Ruffed Grouse Society), Russ Ehnes (National Off-Highway Vehicle Conservation Council), James Magagna (Wyoming Stock Growers Assoc.), Joan May (San Miguel County Commissioner), Pam Motley (West Range Reclamation, LLC), Peter Nelson – via telephone (Defenders of Wildlife), Candice Price (Urban American Outdoors), Rodney Stokes (MI Governor's Office), Chris Topik (The Nature Conservancy), Thomas Troxel

(Intermountain Forest Assoc.), Lorenzo Valdez (Rio Arriba County), Ray Vaughan (Wildlaw),

California USFS Staff

Ed Armenta, Dirk Charley, Kevin Elliott, JoAnn Fites-Kaufman, Dean Gould, Sonja Lin, Mark Metcalfe, Jim Offedal, Juana Rosas, Denaya Shorter, Deb Whitall, Don Yasuda

National USFS Staff

Tony Tooke, DFO, Chris French, Bruce Meneghin, and Andrea Payne

Facilitators

Kathleen Rutherford (Kolibri Consulting Group), Jonathan Geurts (Kolibri Consulting Group)

Welcome

Kathleen Rutherford, Tony Tooke, Chris French, Pam Motley, and Ray Vaughan welcomed the Committee. They described how the group is entering a new functional phase, from generating consensus recommendations to improve the draft directives to assisting with implementation. With this meeting the committee will begin to work more closely with the Early Adopter Forests. The co-chairs urged the Committee to approach this meeting with an eye to learning, and to watch for lessons that may be applicable on a national scale. Deb Whitall was thanked for her effort gathering Region 5 stakeholders to present at the meeting.

Committee Introductions and Updates

Committee members updated each other on recent activity relative to forest planning. Highlights include:

- A key question the committee will have to target to each audience in their outreach efforts is “Why does this matter to me?”
- A request for thoughts to formulate an invited op – ed piece
- A member presented at the Public Interest Environmental Law Conference in Eugene, OR, about wildlife habitat connectivity.
- One member’s group presented on the effectiveness of manual hazardous fuel treatment before Congress.

Update on Directives & Questions

Chris French updated the committee on the current status of the directives. At present, the directives team is engaging with professional editors to make the document more readable and concise than the initial draft. This is a difficult process, as the Forest Service team is fighting to maintain the original intent of each component as recommended by this committee. Some points have been added for clarity, such as a set of steps for how to use the criteria of the wilderness process.

Chris then shared a Gantt chart depicting key milestones between now and publication of the final directives in May 2014. Major components of the process include the response to over four hundred categories of comments received by the agency on the document, and the regulatory clearance and review by other federal agencies. The chief critique coming to the agency from progressive reviews has focused on finding the right balance of documentation. The agency is on track to finalize the directives in May (apart from the amendments necessary to align it with emerging policy, such as the new Farm Bill). Technical guides will also need to be developed, which may be a good parallel with the duties of this committee.

Work Group Updates

Citizens' Guide Work Group

Pursuant to conversations with USFS leadership in the November meeting, the workgroup has initiated discussions and created a table of contents for an accessible, graphic-heavy guide to assist a broad selection of stakeholders understand when, where, how and why to participate in the planning process. The idea is to take a modular approach to the guide, so that it can be added to and updated on a regular basis. External experts may be invited to join the working group, such as those that presented on the Open Standards Framework. The USFS thanked the group for work accomplished to date and re-affirmed the agency's interest in this deliverable. Once the draft has cleared committee deliberations, a professional editor will be provided to finalize the text for publication (both in print and online).

Outreach (formerly Ambassador Role) Work Group

The group decided to base their presentation on the Citizens' Guide. The impetus behind this workgroup is to generate material for committee members to present to

different audiences about why forest planning matters to them- why they should care. The presentation will have a core of general information, with space before and after it to customize for different audiences. It was also noted that referring to these activities more broadly as outreach rather than ambassador role would remove unnecessary political overtones. Producing a video as part of the outreach toolkit was also recommended to expand the outreach effort.

Monitoring Work Group

This group was established to address two distinct aspects of monitoring: (1) to assist with the transition from monitoring requirements from the 1982 to the 2012 planning rule, and (2) to help with broad scale monitoring. The USFS Washington office has requested transition strategies from each region, and these documents are currently in review. They see a potential role for the national office in developing a crosswalk between the 1982 and 2012 requirements to aid this transition. The agency could really use committee help partnering with outside parties to assist in broad-scale monitoring. The committee also agreed to discuss and recommend a process for determining priority questions to address in broad scale monitoring during the May meeting.

Early Adopter Assessment Work Group

This committee sees itself as a conduit for best practices and a node for communication. Accordingly, they have requested a standing agenda item on the monthly learning call between USFS planners. They have prioritized seeking early adopter stakeholder input, and will continue to sort out how best to go about that. Including stakeholders in meetings of the FACA committee is one means of achieving that goal.

The USFS then provided an early adopter update. Three early adopter forests are working to complete draft plans by this fall, the rest by next spring. One of the main challenges of the directives is making them usable by all the diverse forests in the system. So far, early adopter forests have had much more success at engaging the public early and often than previous planning efforts. Challenges related to assessments include scope, sequencing (e.g. assessment is in progress as plan components conversations are beginning). Initiating the process absent directives brings a unique set of challenges. Youth and underserved community engagement has not been universal.

Key innovations, challenges and lessons learned/emerging best practices from three Region Five Early Adopter Forests

In preparation for the meeting, Region 5 was asked to organize their presentations to the committee around key challenges, lessons learned and innovations, as well as emerging best practices. Highlights follow.

Barnie Gyant, Deputy Regional Forester for Resources, Region 5 opened the session thanking the committee for visiting California. He noted that the USFS manages twenty percent of California's land and the sources for most of its water. Collaboration is key to moving forward on natural resource management in this context, and progress is necessary due to the need to mitigate catastrophic wildfire. Mr. Gyant noted that the agency already does a significant amount of monitoring. The important question is what happens with that information. The establishment of and communication with forest collaboratives, increased collaboration with Tribes, and a better relationship with environmental advocates are some of the keys to success in which California takes pride.

Kevin Elliott, Sequoia National Forest Supervisor, Ed Armenta, Inyo National Forest Supervisor and Dean Gould, Sierra National Forest Supervisor shared a number of positive lessons learned to date, including the assessment phase afforded them a great opportunity to get to know their stakeholders. They enumerated a number of challenges and lessons learned to date. Challenges include difficulty in staffing key positions. The three objectives for the new planning process – that it be cheaper, quicker, and less process intensive – have been difficult to achieve but effectively drive progress towards a final product.

Lessons learned include the need to balance conciseness in decisions with the desires of stakeholder to see each of their concerns reflected. With respect to determining the need to change, additional learning includes the need to clearly articulate decision spaces, and the need to sustain communications throughout the process. They noted that the bioregional assessment helped them combine efforts and analyze issues as part of a larger system. In response to the question what do you need most from this committee they stated their appreciation for checking in with us from time to time and offering guidance, and requested the committee make an effort to speak with one voice when interpreting the directives.

Public Comment- see Appendix 1

Next, Deb Whittall, Acting Regional Ecosystem Planning Director for USFS Region 5, was joined by a group of USFS personnel and stakeholdersⁱ actively engaged in the planning process. The group spoke to key innovations, challenges and lessons learned to date with respect to organization and structuring for effective collaboration. The group also spoke directly to their experience around a number of key issues including species of conservation concern, tribal engagement, outreach to youth and underserved communities, timelines and tradeoffs.

Innovations: Structuring and Organizing for Effective Collaboration

An overarching innovation in Region 5 is a very structural approach to collaboration- within the USFS, across other governments engaged in landscape scale planning processes¹, and the Sierra Cascades Dialogue and bioregional assessment. Region 5 developed a regional planning team to work directly with planners in each Forest in the Region. The team is designed around key points in the 2012 Planning Rule, including social, economic, and ecological sustainability. Team members include a hydrologist, recreation planner, writer, sociologist, and economist.

Lessons Learned/Emerging Best Practices

A third party facilitator is necessary both internally and externally to the process. Each forest needs a full-time tribal relations director to maintain respectfully appropriate government-to-government relations. The intersection of US and Tribal law, (e.g water law), is complex enough to require a high level of communication.

Group cohesion is established through the Sierra Cascades Dialogue, which takes on contentious issues within the group between planning periods. The Sierra Cascades Dialogue and bioregional assessment prove that seemingly disparate interest groups can be brought together with a clearly productive output, such as the regional

¹ In these planning processes, USFS worked to link up with the other major California landscape planning processes, including the state water plan, the state forest and rangelands assessment, and the state wildlife action plan. See **also** <http://biodiversity.ca.gov/>

bioassessment. They noted that a collaborative group should be working together for at least two years previous to a planning effort.

Challenges – Timelines, Trade-offs and Communication

Stakeholders and the USFS identified the key challenges as timeline, and managing communications and expectations around finalizing the assessment and need for change.

Key Issues

- Species of Conservation Concern (SCC) --Often there is little information for SCC in the assessment because little information is known.
- Economics and Social Conditions--The tribal forums are starting to really work, incorporating tribal knowledge into the plan components, themselves. The regional planning team has both an economist and a social scientist. The two reinforce each other and approach issues very differently. Economic and social benefits hinge on quantifying ecosystem services.
- Engaging youth and underserved communities--Building trust with youth and underserved communities takes time and effort, repeat visits. It requires care to structure interactions in terms that relate directly to a group's interests in and concerns about the forests. This begins with outreach and education about contributions of forests to daily life (e.g water) and extend into inviting youth and underserved communities into careers with the USFS.
- Timeline-Panelists noted that early on, the planning process was very good at incorporating collaborative input, but the tight timetable between the draft and final versions of the assessment caused the process to become less transparent and participatory, particularly with respect to finalizing the need for change. Stakeholders reflected their views both in public comment and in the panel format that this has adversely impacted the trust dimension of their relationship with the USFS, and they are concerned with the adequacy of the assessment.

Finding the right balance in finalizing the assessment has proven a challenge. The driver on the timeline includes but is not limited to the rule. One USFS staff person noted that we don't have the time to wait on a perfect plan, especially given wildfire

concerns--one of the big innovations in this planning rule is that it is okay to be imperfect the first time around.

World Café Breakouts

Committee discussion surfaced four key topics to further explore in breakouts: 1. Outreach, 2. Trade-offs, 3. Broad-scale Monitoring, and 4. Government and Governance. Members of the public, USFS personnel and committee members joined mixed member groups and rotated through the four stations. Facilitators reported out the following highlights.

Outreach

This station covered how to generate meaningful participation from a diverse array of stakeholders. Potential challenges to participation include how to effectively catalyze participation absent a “burning issue”. One suggestion to meet this challenge is to constitute a small, standing advisory committee that could maintain collaborative energy over time, occasionally scaling up to meet discreet planning efforts. Each group has its own leadership structure, knowledge of which can help the USFS target outreach efforts. To be inclusive, meetings should be advertised in interest-based language targeted to the groups that most need to be engaged.

Trade-offs

This station solicited the major procedural conflicts inherent in the new planning process. Chief among these is the tension between developing an acceptable plan that can be added to and adapted versus one that emerges as perfect as possible upon its release. To guide the scope of the planning process, the USFS should be very clear about its available resources and expectations from the start, including services it plans to put on hold for the duration of planning. These expectations would benefit from regular dialogue between the USFS and stakeholders.

Broad-scale Monitoring

This station explored the issues of partnering in a landscape monitoring effort. Key points included the need to build a coalition early and on a foundation of clear communication about scope and scale. Monitoring should answer only those questions that need to be answered to make good decisions. To streamline data gathering, the

issues of data compatibility and verifiability between entities need to be addressed. In addition to broad-scale monitoring/adaptive management, SCC, desired conditions and NRV were also discussed.

Government and Governance

This station analyzed the structure of the California early adopter planning efforts. Key points included the need to establish good intergovernmental coordination (including between federal agencies) to ensure all-lands connectivity. Government coordination should be organized around issues that cross jurisdictions and expertise. Internally, high staff turnover and the resulting inconsistency has disrupted working relationships with external stakeholders.

Work Groups

The committee outlined a set of work groups to carry forward action items from this meeting.

The Outreach Work Group will combine the Citizens' Guide and Outreach (formerly Ambassador Role) Work Groups, devoted to presenting in understandable language how to participate in a planning process and the need for doing so.

A Government Participation Work Group will develop a guide to inform interactions and relationships between the USFS and other federal agencies and government entities.

A Partnership Work Group was organized to help the USFS partner to share information and effort in cross-sector relationships.

Next Steps

The committee discussed how to process and deliver value from the lessons learned at this meeting. To qualify as lessons learned from the Committee, more data will need to be gathered from other Early Adopter forests. Accordingly, the committee will share key observations to be collected via survey monkey following the meeting. Those

observations may serve as the basis for lessons learned in the future, and could also be utilized to craft communications to USFS leadership as the committee deems necessary.

Work Group Milestones and Deadlines

The committee drafted tasks, products, and deadlines to be finalized by the three new work groups. The priority focus between now and the May meeting will be the Citizen Guide and Government Participation guidance.

¹ Sonja Lin, Acting Regional Planning Team Leader; Don Yasuda, Regional Planning Team Wildlife Biologist; Jim Oftedal, Director Central California Consortium, Chor Yang, Juana Rosas, and Denaya Shorter from the Sierra National Forest and Dirk Charley, Tribal Relations Program Manager for the Sierra and Sequoia National Forests. Ed Armenta, Jo Ann Fites-Kaufman, Mark Metcalfe, Juana Rosas, Denaya Shorter. Steve Brink (California Forestry Association), Amy Granat (California Off-road Vehicle Association), Staci Heaton (Regional Council of Rural Counties), Danna Stroud (Sierra Nevada Conservancy), Craig Thomas (Sierra Forest Legacy), Stan Van Velsor (The Wilderness Society)