

Objectives

- Learn from staff and stakeholders engaged with the Land Management Plan revision process on the Nez Perce-Clearwater and Flathead National Forests, and use this information to determine next steps for the committee informing the implementation of the 2012 Planning Rule (the rule).
- Complete deliberations on the content of the Citizens' Guide and Government Participation Guide.

Action Items & Next Steps

- This committee's two-year term will end on June 5, 2014. Eighteen members of the current committee have applied for reappointment, and the committee's new membership will be announced as early as late June, 2014.
- USFS staff and committee members will look for process charts for potential adaptation and incorporation into the Citizens' Guide (see Appendix A).
- Greg Schaefer will look into how climate change adaptation fits into forest plans.
- Tom Troxel and Susan Jane Brown will incorporate changes and additions to the Citizens' Guide addressed in this meeting, including additions to the key issues sections (see Appendix A).
- Tom Troxel will draft the fire and fuels section of the Citizens' Guide.
- Chris Topik or someone within his or Susan Jane Brown's network will draft the climate change section of the Citizens' Guide
- Chris French and Jim Magagna will add to the Government Participation Guide, comparing coordination under the National Forest Management Act (NFMA) and the Federal Land Policy and Management Act (FLPMA).
- Lorenzo Valdez will work with Kathleen Rutherford to draft a segment on the Historic Preservation Act for the Government Participation Guide

MEETING SUMMARY

Present

Committee Members

Mike Anderson (The Wilderness Society), William Barquin (Kootenai Tribe of ID), Susan Jane Brown (Western Environmental Law Center), 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 (Defenders of Wildlife), Candice Price (Urban American Outdoors), R. Greg Schaefer

(Arch Coal, Inc.) Thomas Troxel (Intermountain Forest Assoc.), Lorenzo Valdez (Rio Arriba County), Ray Vaughan (Wildlaw)

National USFS Staff

Tony Tooke – DFO, Chris French, Ann Goode, and Andrea Payne

Facilitators

Kathleen Rutherford (Kolibri Consulting Group), Jonathan Geurts (The Keystone Center)

Welcome

Kathleen Rutherford welcomed the committee and tribal representatives. She reviewed the day's objectives and agenda and a selection of ground rules drawn from the committee's operating protocols. She also thanked Andrea Payne for coordinating the logistics for this meeting.

Mike Durglo Sr., an elder of the Confederated Salish and Kootenai Tribes (CSKT), offered a prayer to begin the meeting.

Tony Tooke, Pam Motley, and Ray Vaughan welcomed the Committee and thanked the many USFS staff who helped coordinate the meeting as well as the informal field trip the day before.

Chris French explained the status on the directives and the process to develop technical guidance. At this point, the directives are in a multi-stage review process that is expected to result in their publication by the end of July. When they are published, a set of technical guides will also be developed for internal use. The subjects covered in these guides are determined from an evaluation of regional need. Citizens' Guide will be the first directed at an external audience, as well. The USFS will seek the committee's input into the development of these guides, which will be ongoing as they are adaptable documents.

Committee Introductions

Committee members introduced themselves, including their organizations and represented interests.

Citizens' Guide Update

The chairs of the Citizens' Guide work group described the present state of the Guide, the primary function of which is to encourage more people to engage more actively in the planning process. In addition to the process overview, the Guide contains 16 distinct issue papers. The group brainstormed specific additions to the key issues sections of each of the subject papers and specific process components (see Appendix A for details).

Three more sections – on climate change, fire and fuels, and travel management – are planned for inclusion.

The committee discussed the next steps for the Guide. The committee agreed to let functionality (a balance between readability and inclusion of necessary content) drive the length of the end document, rather than a predetermined number of pages. In general, the human aspects of planning could use more content to more firmly link forest planning to human concerns. Drafters should edit out negative, regulatory, language and replace it with positive, accessible language. Drafting assignments were made, and the expectation set for another A successful editing process will need to be informed by a very clear set of directions, including its intended purpose, tone, and audience. The Guide should also be rich in links to more detailed information for those wishing to engage more fully, and placeholders need to be added for case studies could be continually added. The development of graphics and final text will involve an iterative process between the designer, editor and the committee.

A broader communication strategy should be explored to facilitate dissemination of the guide. Recommendations to this end include the production of materials that bridge more introductory information in accessible formats, including a Q&A page, a tri-fold brochure or pamphlet, and/or a video.

Lunchtime Tribal Panel

Tony Tooke introduced a panel of tribal representatives, convened at the request of the committee's Government Participation Work Group, to present on consultation and collaboration with the US Forest Service. Brief highlights of each speakers' presentation follow.

Confederated Salish and Kootenai Tribes (CSKT)

CSKT Councilman James Matt emphasized the good existing relationship with local USFS managers. Tribes like his hold a significant long term interest in forest management, given their thousands-years-long residence on the land. The CSKT has successfully purchased over 600,000 acres of land in a buy-back program but could still use funding for fuels management.

Tribal elder Mike Durglo Sr. described the composition of the CSKT, which includes the Bitterroot Salish, Pend d'Oreille, and Kootenai tribes, each of which has its own language and culture. He noted that USFS land exchanges with State managers are a major concern, as they cause the tribes to lose influence. He also noted that cultural input incorporated into forest plans is currently insufficient.

Tribal Forestry Department Head James Durglo emphasized the good relationship the CSKT have with the USFS, relating however that the tribes currently do not have the capacity to participate in all of the planning processes that affect them. He noted that tribes are a valuable resource for those interested in consultation. Mr. Durglo further noted that Tribes promote forest stewardship contracting and encouraged the committee to communicate the need to prioritize activities carried out under the Tribal Forest Protection Act to the Secretary of Agriculture.

Nez Perce Tribe

Nez Perce Tribe Staff Attorney Mike Lopez described the tribe's historical land, nine million acres of which are currently under USFS control which comprises 6% of the USFS's total land base. The 1855 treaty between the tribe and the US government established a 750,000 acre homeland, including hunting and fishing rights outside this reservation. The USFS has recognized the Nez Perce for its fisheries management and restoration program.

Nez Perce Tribal Wildlife Director Angela Sandenaa described the importance of the USFS's trust responsibility to consult with the tribe. Resources gathered from federal land generate a measurable positive economic impact for tribes. Ms. Sandenaa noted that the Tribe is engaged and interested in participating in the planning process, particularly in regards to designating species of conservation concern.

The committee engaged the tribal representatives in a discussion focused on the barriers to and successes in tribal engagement in forest planning. Barriers included the time it takes tribes to offer authoritative representation, ambiguity around what triggers a formal consultation, and the difficulty of finding and expressing traditional ecological knowledge. Successes include the development of cost-share agreements and other agreement mechanisms to ensure continuity between successive land managers. Concerning capacity, panelists noted that the Nez Perce tribe's scientific monitoring services are on par with those of the USFS and can be drawn upon to support the broad scale monitoring effort. In conclusion, the panelists requested the committee's help

communicating their need for capacity and willingness to participate to the Secretary of Agriculture.

Government Participation Guide

Members of the committee's Government Participation Work Group introduced the intent and content of the Government Participation Guide. The guide is directed at local government and is meant to cover intergovernmental engagement in forest planning *beyond* formal consultation and other legal/regulatory obligations. The presenters emphasized the logic underpinning the three part typology of communication, coordination and collaboration. Specific edits were made directly to the guide and will be completed for review at the next FACA committee meeting. The group discussed the dissemination of the guide and concluded to recommend that USFS planning staff should both read the guide and distribute it to local governments as a part of their outreach.

Region 1 Line Officers Panel

Regional Forester Faye Krueger, and forest supervisors from the Nez Perce-Clearwater National Forest-Rick Brazell; Flathead National Forest- Chip Weber; and Helena National Forest-Bill Avery presented challenges, successes, and emerging best practices. Key highlights follow.

Ms. Krueger described three levels of engagement- closed collaboration, open collaboration and public involvement. She observed that collaboration is not a rapid process, and emphasized the need to do it right over the need to do it fast. Region 1 has been considering establishing a regional interdisciplinary team that would move from forest to forest to assist in planning efforts.

Mr. Brazell listed the challenges of trying to meet a short timeline, of working between established and plan-specific collaborative groups, and of geographic data inconsistent with on-the-ground conditions. Successes included the decision to extend the timeline, early outreach to county governments, and the ability of the established Clearwater Basin Collaborative to set a good tone in broader collaborative meetings. Innovations included the use of videoconferencing for meetings.

Mr. Weber listed the challenges of working on several plans simultaneously, fostering collaborative spirit in a positional community, and engaging youth over the long term. Successes came from hosting field trips, having a decision maker present at public meetings, and hiring a third party facilitator to give USFS staff the space to

listen and participate. He noted that in future planning exercises, the planning team might be able to work with teachers to incorporate the process into their curricula.

Mr. Avery noted that the Helena NF is at the beginning of its plan revision process. A key challenge will be the large number of counties to coordinate. Strengths to draw upon include the established Southwest Crown Collaborative, solid partnerships with user groups, and a strong Youth Forest Monitoring Program. Current challenges include the large amount of time necessary to fill a planning team, inconsistent geographical data, and the need to develop a robust remote participation method.

Nez Perce-Clearwater National Forest Panel

A group of stakeholdersⁱ and USFS staff spoke to key innovations, challenges, and lessons learned to date on the Nez Perce-Clearwater National Forest plan revision process.

Background: 60-80 people regularly attended full-day Saturday meetings, for which pre-work had been assigned. Innovations included the use of video teleconferencing, a mid-day meal provided by the USFS, and e-collaboration which provided for input opportunities for those who could not participate in person.

Challenges encountered include the use of interdisciplinary team members from outside the region, who may be less familiar with regional ecosystem needs; the decision of which planning duties are the best to contract, which should displace existing projects, and which are important enough to justify the risk of hiring new staff has proven difficult. Panelists noted that the development of recommended wilderness near Coeur d' Alene did not engage the urban population as much as it could have. Others noted that the recommended wilderness does not include all of the mountain goat winter range specified by the state. Another expressed the view that land use designations can accomplish the goals of wilderness without excluding users, and suggested the USFS should aim to manage the resource instead of the users. Panelists also noted that due to ESA listings, the USFS would benefit from earlier input from the US Fish & Wildlife Service.

Innovations included video teleconferencing, a mid-day meal provided by the USFS (for informal interaction), and e-collaboration modes of input in parallel to the Saturday meetings for those who could not attend. Ed Krumpe and Kate McGraw from the University of Idaho presented on Ms. McGraw's innovative approach to youth engagement, which she conducted both online and in person at local schools. Online participation took the form of a user friendly website, which included a mapping tool

and a feedback blog organized by school class. In-person outreach asked three questions of students, which they readily answered: How do you use the national forest? Where do you like to go in the national forest? How would you like to see the national forest managed for your future?

Flathead National Forest Panel

A group of stakeholdersⁱⁱ spoke to key innovations, challenges, and lessons learned to date in the Flathead National Forest plan revision process.

Some Flathead panelists agreed with those on the Nez Perce-Clearwater that collaboration is a good way to generate solutions to complex problems, noting however that collaboration requires more time than was afforded in the format provided to learn and build trust. Panelists noted the need to better strike a balance between addressing the broad, forest-wide planning scale, best available science and local concerns. Despite this fact, the plan revision team was perceived as transparent with both the process and their own knowledge throughout.

Challenges included some frustration with audio conferencing for those attempting to participate remotely. A Google Earth Group seemed to work well for those who relate well to maps, but it did not have broad uptake. Additionally, panelists noted that there are currently few options for disabled recreationalists to access the national forests and that the species-by-species approach to ecosystem management is limited. The planning rule guidance needs to offer a clearer way to reference the historical context of an ecosystem when determining desired conditions.

Lunchtime Partnership Panel

Convened at the request of the committee's Government Participation Work Group, a panel presented on developing information-sharing partnerships with the US Forest Service.

Linh Hoang, Regional Inventory, Monitoring, Assessment, And Climate Change Coordinator (USFS Region 1), presented on the Northern Rockies Adaptation Partnership (NRAP) which has been tasked with developing climate change vulnerability assessments within the northern Idaho, western Montana, and Yellowstone areas. She also presented USFS Region 1 current thinking on broad scale monitoring. She expressed hope that a landscape emphasis will help streamline duplicate work, for example multiple goshawk studies.

Michael Hand, economist (Rocky Mountain Research Station), presented on the importance of including economic and social science information in planning. A human-wellbeing-centric focus is crucial for gauging the potential effects of

management decisions. Economists can quantify the benefits received from actions in monetary form.

Mitch Silvers, State Director For Intergovernmental Affairs And Environment (US Senator Mike Crapo), described a general shift away from an adversarial tack to a more collaborative approach between his Congressional office and the USFS. He emphasized that the benefits go both ways, as participating in collaborative approaches can connect members of Congress with their constituents as well as helping the USFS develop better plans.

Holly Endersby, Conservation Director (Backcountry Hunters and Anglers), spoke as a member of the Clearwater Basin Collaborative (CBC). The CBC membership was carefully selected to maximize the diversity and potential longevity of participants, which would enable the development of true collaborative relationships. Its meetings are open to the public. The CBC has helped the USFS with vegetation management, through an agreement in a memorandum of understanding. She expressed concern with the integration of CBC input and broader planning collaborative input in decision making.

Sarah Lundstrum, Glacier field representative (National Parks Conservation Association), described the function of the Whitefish Range Partnership (WRP)- a collaborative organized to make consensus recommendations on the management of the Whitefish Range. Their meetings each began with USFS presentations that established the possibilities and limits of planning and educated the partnership in planning issues and process. After eighteen months, the WRP issued a unanimous set of 14 recommendations. The group has amended their charter to continue to advocate for those recommendations.

World Café Breakouts

The committee identified four questions from the early adopter forest panels they wanted to further explore in facilitated breakout sessions. All in attendance (public, committee, and USFS personnel) split into four groups and rotated between each of four stations. Key highlights from those conversations follow.

What guidelines can help the USFS better manage public expectations of the process?

This station emphasized the need to repeat process sideboards and guidelines and to educate participants about the planning process early and often. Key guidelines include the role of best available science, the relationship between collaboration and decision making, the difference between project and plan level outcomes, the role of facilitators, and what can be expected at each stage of the planning process. Planners may want to ask participants what they expect of the process to align expectations early on.

What will keep the public motivated and engaged throughout the planning process?

This station yielded many ideas for good process, beginning with clearly described and communicated roles, responsibilities, goals, objectives, and expectations for participants, USFS staff, and the planning process. One of the key messages was that the process is more properly labeled “enhanced public engagement” rather than collaboration. Many comments emphasized clear, straightforward two-way communication. The use of social media would broaden the pool to youth and other interest groups, but should also not be seen as a panacea. The planning schedule should be sustainable, including breaks, meals, and other informal space to communicate and develop relationships. Emphasizing common ground builds a shared identity. Offering opportunities for participants to take on increasing responsibility builds sustainable engagement and ownership of the process. Periodic expressions of gratitude demonstrate respect for time and effort given.

To what degree should adaptive management and monitoring be considered in the early planning process before the development of a proposed action?

This station explored the public’s comfort with adaptive management, which on the one hand can allow the USFS to respond quickly to threats and on the other hand may seem to give the agency too much flexibility in implementation. One recommendation was to introduce the concept early and often, another proposed an incremental approach, and another said to communicate in very general terms until the effects analysis stage of planning. It seems as if planning for adaptability might result in lists of “if-then” conditional statements. One idea was to investigate projects planned under the Collaborative Forest Landscape Restoration Act, as it already requires adaptive management and monitoring plans up front.

Is there a way to keep the public involved in the development of plan components, including the need for change and desired conditions?

To keep the public involved, they need to be made aware of the multiple modes of participation available to them. To best inform the need for change and desired conditions, the assessment should be complete before the collaboration effort begins. The USFS should not disappear during plan writing but keep in contact with the group so it can help with implementation and monitoring. The formal NEPA process and the collaboration effort can continue in parallel with each other.

Public Comment

Zach Porter of the Montana Wilderness Association first observed a need for neighboring forests to coordinate on planning. Second, the USFS needs to engage regional population centers and national level organizations in planning. Third, he asked whether pre-scoping collaborative input would be weighted differently from public comment and the formal NEPA process in decision making. Finally, as consensus is not a goal of the planning collaborative, the process should better be referred to as “intensive public engagement” rather than “collaboration.”

Randy DePaul, a private landowner thanked the committee and requested they advise with an eye to the future, more than five years down the road. The USFS is struggling with funding cuts, so any influence the committee can exercise to help them out would be appreciated. He also reminded the committee to remember the pride of those who have gone through physical difficulties and continue to promote recreational access for disabled users, including disabled veterans.

Committee Reflection on Lessons Learned

Committee members considered their observations on the collaboration process and data sharing partnerships, including potential recommendations they should make. They also considered what other topics they still need information on.

One member described the purpose of collaborative groups as preparing the soil for good decisions. A potential tension between local collaboratives and national interests needs to be addressed with a comprehensive multi-tiered participation approach. One member recommended the committee develop a program of work for forests, including how to transition from a preliminary collaborative process to the NEPA process. It may still be too early to issue such guidance, but it could be in the committee's future. The development of data sharing partnerships seems to be one potential solution for the problems of insufficient participation, science, and capacity in planning. Nevertheless, they need to be developed carefully due to the problems introduced by inconsistent data sets.

One of the clearest observations from the Region 1 forests was the need for the USFS to clearly define the role of the assessment, the limits of planning, what input is needed at what stage, and how public input will be used. Forests will be able to communicate more clearly as the agency gains experience implementing the new planning rule's process. The strongest innovations from this region include the methods of youth engagement, the use of Google Earth, and the use of video teleconferencing. The establishment of a roving interdisciplinary team also seems like a good idea. There are currently four different interdisciplinary team models in use nationwide, which may benefit from committee review.

In the future, committee members would like to see more focused policy inputs, less on process, e.g. broad-scale monitoring, and a deeper dive on inventory, monitoring, and evaluation to see the long-term sustainability of the rule, finding and incorporating traditional ecological knowledge from Tribes and figuring out how climate change adaptation fits into plans.

ⁱ ***Nez Perce-Clearwater National Forest stakeholder panel:*** Rick Brazell (Nez Perce-Clearwater National Forest), Don Ebert (Clearwater County), Derek Farr (Backcountry Hunters and Anglers), Carol Hennessy (Nez Perce-Clearwater National Forest), Alex Irby (Clearwater Basin Collaborative), Ed Krumpe (University of Idaho), Bert Lindler (Montana Wilderness Association), Kate McGraw (University of Idaho, Nez Perce-Clearwater National Forest), Timory Peel (Nez Perce-Clearwater National Forest), Angela Sandenaa (Nez Perce Tribe), Stan Spencer (Backcountry Sled Patriots), Katherine Thompson (Nez Perce-Clearwater National Forest)

ⁱⁱ ***Flathead National Forest stakeholder panel:*** Kali Becher (Missoula County Community and Planning Services), Noah Bodman (Flathead Fat Tires), Randy DePaul (private landowner), Keith Hammer (Swan View Coalition), Jon Haufler (Ecosystem Management Research Institute), Sarah Lundstrum (National Parks Conservation Association), Paul McKensie (F.H. Stoltze Land and Lumber Company), Maria Mantas (Swan Ecosystem Center), Ron Normandeau (Recreational Aviation Foundation), Amy Robinson (Montana Wilderness Association)