

U.S. Forest Service National Advisory Committee – Forest Planning Rule Implementation
January 27- 29, 2015
Holiday Inn, City Center
230 North College Street, Charlotte NC

Introduction

The National Advisory Committee for Implementation of the National Forest System Land Management Planning Rule (the committee) held its second meeting of the new charter from January 27-29 2015, in Charlotte, NC.

Objectives

The objectives of the meeting were to agree to a process for finalizing the Citizens' and Government Guides; finalize the Turnover recommendations; engage with key Forest Service personnel and other stakeholders active in the Land Management Plan Revision processes in Region 8; review the final directives and discuss how the committee's recommendations were incorporated; update the committee as a whole on each workgroup's progress and provide advice as needed to further advance workgroup progress.

Committee members present: Mike Anderson, William Barquin, Susan Jane Brown, Robert Cope, Adam Cramer, Daniel Dessecker, Russ Ehnes, James Magagna, Joan May, Peter Nelson, Martin Nie, Candice Price, Greg Schaefer, Angela Sondenaa, Rodney Stokes, Chris Topik, Thomas Troxel, Lorenzo Valdez, Ray Vaughan, Lindsay Warness,

Committee members absent: Vickie Roberts

Staff: Leanne Marten-DFO, Chris French, Anne Acheson, Annie Goode, Bruce Meneghan, Jennifer Helwig, Regis Terney, Mindy Hackett

Facilitators: Kathleen Rutherford and Pam Motley

Agreements and Actions

1. Recommendations

- a. The committee agreed to submit Turnover recommendations to the Secretary and Chief as presented with the minor edits discussed in the meeting. The group discussed and agreed to table pursuing larger hiring issues such as the practice of filling vacancies with interim people.
- b. The committee recommends that the agency produce a 'Planning 101' Video(s) – conveying to the American people the importance of our National Forests and explaining the role of forest planning in protecting and managing these public resources.

2. Guides

- a. The committee concurs with the text of the Citizens' (version 4.0) and Government (version 0116_2015) Guides that were presented at the meeting. The workgroups will incorporate some of the Regional Planner edits received. The guides are expected to be finalized in consultation with the FS editor in the next few months.

3. Workgroups

- a. The committee agreed to constitute an Adaptive Management workgroup that includes the Assessment/Climate Change/ Monitoring/Restoration workgroups. The issues are highly related and combining these groups will allow for greater integration.

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- b. The Assessment workgroup has identified draft key findings on the need to more explicitly link assessments, monitoring and need for change. The Adaptive Management workgroup will continue to pursue this.
 - c. The committee identified the need to inform forests and stakeholders about FACA guidelines. The Outreach workgroup agreed to look at existing guidelines and will determine if these are adequate or if additional materials are needed.
4. Roll out on final directives
- a. The co-chairs will draft a letter to the Chief and Secretary, a press release and talking points 1) supporting rule and noting that 2) the completion of the final directives and support for the process that went into the directives; 3) the changes made to the directives embody the intent of the committee's recommendations; 4) there are big improvement to specific areas including the wilderness inventory process, 5) the requirement for socio-economic monitoring was added, 6) outreach to a broader segment of the American public is a key objective; and 7) the agency modeled collaborative behavior in working with the committee and the public on the directives.
 - b. The committee will have the opportunity to participate in future targeted learning labs on the directives.
 - c. The facilitation team will work to develop a calendar of speaking opportunities for committee members.
5. The next meeting
- a. The next meeting is scheduled for April 28-30 in Washington, DC.

Meeting Summary

Welcome and Committee Purpose

The committee co-chairs, Ray Vaughan and Susan Jane Brown, welcomed the committee. Ray noted that this will be his last meeting as co-chair. Both expressed that they were looking forward to hearing from Region 8 forests on key challenges and innovations and reiterated the committee's mantra 'Learn Locally, Act Nationally'. Leanne Martin, the Designated Federal Official, welcomed the committee as well.

Committee Member Introduction and Updates

The committee members introduced themselves and updated the group on plan revision-related activities. One member met with the Tongas and Chugach National Forests, plans to meet with Regions 5 and 6 to discuss spotted owl forests plan revisions, and has submitted comment letters on behalf of his organization to several early and mid-adopters. The Wilderness Society is working on a review of the wilderness inventory process used by eight early adopter forests. The draft report was made available to committee members.

Workgroup Updates

The committee's ten workgroups reported out on progress made since Meeting 9 (September 30 – October 2, 2014), highlighting areas for recommendations and/or further discussion. The committee agreed to meld the Assessment/Climate Change/ Monitoring/Restoration workgroups will into one 'Adaptive Management' workgroup. The issues are highly related and combining these groups will also for greater integration. This will help the committee summarize and synthesize all of the information they are gathering and construct recommendations. The facilitation team will work with the workgroup chairs to summarize what has been learned to date. Calls will be schedule to update the whole group on emerging issues and identify priority areas for action.

Citizens' Guide

The Citizens' Guide has been sent to a Forest Service editor twice to improve tone and content. The workgroup co-chairs edited the guide after this. The committee received this draft (version 4.0) in their meeting packets. The committee is in agreement with the text that they have seen to date. An earlier draft of the guide was also sent to Regional Planners for comment. Overall the planners were complimentary of the product and their specific edits were for the most part helpful. There are a few outstanding issues: adaptive management, implementation (and how it fits into planning cycle), the role of interested person, private lands/all lands approach, and if changing predicted timber outputs would require an amendment. The workgroup will finish reviewing the planner's edits, seek agency advice on the outstanding issues and then send the guide back to the Forest Service editor for a third round of edits to incorporate changes, streamline the document and improve readability. Moving forward, discussions will be limited to co-chairs and Forest Service editor. Once the text is complete, the Citizens' Guide workgroup will turn the Guide over to the Outreach workgroup to develop the format and look.

Government Guide

The Government Guide workgroup also worked with the Forest Service editor on structure and tone. The committee received the latest draft in their meeting packets (version 0116_2015). The committee is in agreement with the text that they have seen to date. The Guide was distributed to Regional Planners for comment. The workgroup is in the process of reviewing these. In response to the planner's comments, the workgroup believes that 1) participation for governments and tribes is different than normal public participation and 2) governments and tribes are the target audience, not the agency. The tone of the Guide needs to reflect this. Once the workgroup has completed its review of the planner comments, the Guide will be sent to the Forest Service editor. An introduction acknowledging the committee's authorship will be added, using language from the citizens' guide. Moving forward, discussions will be limited to the chair and Forest Service editor. Once the text is complete, the workgroup will turn the Guide over to the Outreach workgroup to develop the format and look.

It was noted that with these Guides, the committee is asking the agency to operate in a different matter and that it is important for the committee and agency to be mindful of their interactions. Respectful dialogue will produce durable solutions. It was noted that post transmittal, the Guides will become agency documents. The agency will assume responsibility for future necessary edits and updates. During its charter, the committee will be able to update the Guides on-line with case studies as appendices.

Outreach

The Outreach workgroup spent the past several months gathering information with several workgroup calls. The workgroup co-chairs submitted draft recommendations to the full committee that the agency produce a 'Planning 101' video – conveying to the American people the importance of our National Forests and explaining the role of forest planning in protecting and managing these public resources. The committee unanimously supports the recommendation as described (see appendix for summary description of video) but suggested that it may be impossible to reach all audiences with one product. Multiple videos may need to be produced to ensure that all US citizens are given the opportunity to engage. It is vital that all videos are culturally sensitive and respectful to our diverse citizenship. The committee will not recommend that any particular company be hired to produce the video. A formal recommendation will be issued in the form of a letter to the Secretary and Chief with the committee co-chairs' signatures.

Assessment

The Assessment workgroup stated that its goal is to offer recommendations to ensure that assessments help to build a common and contextual understanding of conditions, trends and information that is relevant to plan development, revision, or amendment. The workgroup is in the process of reviewing the eight available assessments using an evaluation framework that they developed. The goal of the review is to identify red flags and innovative techniques. The workgroup has identified draft key findings on the need to more explicitly link assessments, monitoring and need for change. The Adaptive Management workgroup will continue to pursue these potential recommendations.

Restoration

The goal of the Restoration workgroup is to offer recommendations for integrating the land management planning process with landscape scale restoration activities through implementation of the planning rule. This is a long term task and the workgroup feels that it will be in an information gathering mode for several more months. The group had a learning call with several forests undergoing plan revisions with the 2012 planning rule that also have CFLR projects. Suggestions from the committee include: reaching out to forests that have a CFLR project and are going through revisions with '82 rule as well; linking their review to the cohesive strategy; reaching out to local governments and the Inter Tribal Timber Council; and to review the 5 year CFLR report.

Monitoring

The Monitoring workgroup used the past few months to gather information as well. The group held several learning calls with outside practitioners and agency experts from Region 1 and Regions 2/3 to discuss broadscale monitoring and opportunities for partnerships. The group has not had a chance to distill what has been learned. The group discussed how the committee can best summarize and synthesize all of the information they are gathering to construct useful recommendations.

Climate Change

The Climate Change workgroup has had several excellent learning calls with experts in the past few months but has not had a chance to distill what has been learned. They feel that this group should merge with other workgroups because of the overlapping issues. It was noted that climate change can be an organizing tool during the assessment phase and a part of monitoring. There is also a lot of work going on in the corporate side that may be useful to the agency. The role of the committee may be to connect the agency with experts and corporate strategies. The group will also continue to deliberate on triggers and thresholds.

Objections

The Objections workgroup is looking at four objectives of Forest Plans developed under the '82 rule using the 2012 objection process. The workgroup is seeking to identify areas of common approach, challenges and potential areas for improvement. It was agreed that there is a need for greater public education on how the objection process fits into the larger planning process. Questions that remain to be answered include: How should stakeholders structure their comments and objections? What types of issues are appropriate for objections? What happens after the process? How will the judicial appeal process work?

Potential area for recommendation

During its deliberations, the workgroup identified that the objections seen to date are the result of a lack of relationships. The workgroup suggested that the agency select forests that have strong partnerships and established collaboratives for the revision process. The agency should also put forests on notice of eminent revisions several years in advance and encourage forests to start building relationships prior to commencing revision efforts. In response to these observations, the agency explained the selection criteria for the first round of early adopters. Regional Offices nominate potential forests. The Washington Office looks for compelling reasons to initiate revisions including the need for change. Considerations include the desire for geographic diversity; the status of external resources; the desire to test the flexibility of the rule with varied forests; the existence of an established collaborative; the existence of regional staff support; and the opportunity for regional strategies. These concerns are reconciled with the budget. The goal is to select forests that will be successful. It was suggested that the creation of regional planning teams will help create consistency. The workgroup will continue to pursue potential committee recommendations in this context.

Turnover

The Turnover workgroup presented a draft recommendations on the Transition Process for Forest Service Leadership and Forest Planning Team Members. The workgroup recommends that the agency update and redistribute the Handover Memo to those forests currently undergoing or anticipating initiation of the plan revision process (see attachment – draft 0122_2015). The committee unanimously approved the recommendation with several minor edits as discussed in the meeting. The committee co-chairs will sign the letter to the Secretary and Chief.

Region 8- Insights, challenges and breakthroughs- Regional Foresters perspectives

Presentation by Regional Forester and Forest Supervisors from the Nantahala-Pisgah, Francis Marion and El Yunque National Forests.

Tony Tooke, Regional Forester, welcomed the committee and reflected back on the selection criteria for early adopters used by the agency. With the first eight early adopters, the agency wanted to reflect the uniqueness and diversity of the forests across the country and show that the rule would work everywhere. The early and mid-adopters are serving as learning laboratories, operating without final directives. Each of the three forests in Region 8 present different opportunities and different challenges. The region is currently assessing what has gone well and what adjustments need to be made, striking a balance between all public input. The goal is to have the most informed and collaboratively developed plans possible.

Rick **XX**, the Francis Marion and Sumter National Forests Supervisor, shared that a major breakthrough has been the opportunities to involve youth. The forest is sponsoring job shadowing and leadership training for students and working with an Agricultural School to develop an app. Successes include the fact that relationships were built after Hurricane Hugo, the consensus on the need for long leaf and woodpecker restoration, taking the needed time during the assessment phase and using a collaborative effort. One lesson learned is to bring research into the process early during the assessment. This helped to keep focus on the potential effects of climate change and build resiliency in. It remains a challenge to reach out to diverse communities. Although the area has a high African-American population, participation at meetings does not reflect this.

Kristen **XX**, Nantahala-Pisgah National Forest Supervisor, shared that the forest has had an extensive public outreach strategy with numerous meetings spread out over a large 18-county geographic area.

They are also actively working with tribes. The forest is currently working with three formal collaboratives with the goal of supporting each of these groups. The forest has learned from the public response to the release of the Management Area Framework maps that more time and discussions are needed. The forest will work to foster dialogue and build a plan that everyone can support. The timeline is a concern because collaboration cannot be rushed. The forest is also working to determine how to plan for the over 300 potential species of conservation concern that have been identified.

Pedro Rios, El Yunque National Forest Supervisor, stated that the forest has a robust public involvement strategy including a non-agency Public Participation Advisory Committee. They see that the 2012 rule allows for intimacy that can create fun and effective public engagement. The main challenge is that the short timelines make it difficult to cultivate relationships. It takes time to have effective collaboration and share a common vision and purpose when working with two cultures and two languages. Other challenges have been that Nature Serve did not list many of the forest's species of conservation concern.

Region 8- Insights, challenges and breakthroughs

Nantahala-Pisgah NF - Key Challenges and Innovations - Public Participation, Collaboration and Timelines with respect to Wilderness

Hugh Irwin, The Wilderness Society, shared the observation that there is tremendous potential to build consensus around restoration because it is compatible with wilderness, hunting, timber, and recreation. Active management should be focused on those areas of the forest that need work. He believes that the NP Partnership is working well and that compromise is better than contention. There is concern among many that the forest did not follow the draft directives and FACA recommendations for the wilderness inventory process, eliminating areas with closed level 2 roads. There is also concern that the Management Area Framework maps identified 57,000 acres that could be potential wilderness as suitable for timber production. There is a fear that this may prejudice these areas from not being designated wilderness. The observation was made that the framing of an issue can facilitate collaboration or make it difficult or impossible.

David Whitmire, NC Bow Hunting Association, shared that the forest had a robust public outreach campaign. He felt that the meetings in local communities were well attended and productive. He feels that the grassroots effort to build compromises was smashed by a media blitz from outside interests. It was observed that the 'spaghetti' approach to identifying potential wilderness (throw it all up on the wall and see what sticks) leads to controversy and divisiveness. The suggestion was made to base management decisions on science and the needs of the landscape.

Megan Sutton, The Nature Conservancy, shared that it is challenging to have several separate collaboratives operating with different agendas. She feels that the forest has good intentions but has a very difficult job striking a balance between all interests. The timeline pressure adds to the challenge. Forests are also under staffed. Megan challenged the committee to look into the effects of perceived FACA violations on true collaborative problem-solving. It seems that the fear of violations is marginalizing effectiveness. A suggestion was made that the forest ground their decisions in science and well defined desired conditions. This would allow the forest to build on areas that have broad agreement first and then work towards more difficult issues.

Key Innovation at the Regional Level – Approach to Species of Conservation Concern

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Duke Rankin, US Forest Service, Region 8, Threatened and Endangered Species Program Manager, is working with Region 8 forests on a process to identify species of conservation concern. The agency began by casting the widest net possible and then developed a structured and transparent step down procedure based on best available science.

Francis Marion NF - Key Challenges and Innovations - Public Participation and Collaboration

Collette Degarady, The Nature Conservancy, shared observations on the Long Leaf Pine Implementation Team and their successful partnership with the forest. The group was able to assist the forest with public education on restoration needs prior to commencing plan revision and developed comments on the draft plan. Landscape assessments completed by The Nature Conservancy helped inform the assessment.

Bill Wallace, City Manager, Town of Awendaw, shared the challenges of a small community embedded in the forest. Although much of the forest was planted by the community and families have a deep sense of pride and connection with the forest, they question how they fit into the plan revision process. He has attended most of the meetings, but locals are still unsure of the process. The community is concerned about the impact that the forest has on their ability to grow. The forest needs a better understanding of how they affect the town. There is a need for greater social and economic analysis of local communities.

El Yunque NF - Key Challenges and Innovations - Public Engagement and Transition to Monitoring

Marcela Cañon, a marine biologist and member of the Public Participation Advisory Committee shared insights on the public participation process used during the plan. The committee has been working for two years to develop a foundation for engagement. The forest is culturally important, sacred to many. Prior to revision, people saw it was in federal ownership. This is changing; people are now involved in the process. They are proud to have the opportunity to create governance.

William Pitre from the State Tourism Office and member of the Public Participation Advisory Committee stated that it was wise of the forest to create the committee. It has been very effective because everyone is at an equal level. There are no experts on public participation. Rather the committee believes in dialogue to determine how to best reach communities. They would like to see the committee remain intact after the revision, taking an active role in implementation and monitoring the public participation in the future. The forest is a motor for social and economic opportunities in the area.

Edgardo Gonzalez, a member of the Public Participation Advisory Committee, shared that the committee is interested in being more active in management of the forest in the long term. He would also like to see the committee remain intact after the revision, taking an active role in implementation and monitoring the public participation in the future. They will need to work with the forest on monitoring protocols.

Committee Discussion: Reflections on what the committee heard from stakeholders and the public

The committee agreed that while it is important to continue to interact with early and mid-adopters, no new issues were raised. There is a desire among many to move into larger policy issues while continuing to ground these with local learning.

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The committee and agency discussed the need to educate forests and the public on FACA rules. The agency currently hosts a training 'Leaders as Conveners' that explains the guidelines. The Collaboration Cadre has also worked with numerous early and mid-adopters on collaboration tools. It was agreed that the agency should offer more trainings for both agency staff and stakeholders and that the committee will identify what tools exist. As part of this effort, the committee will explore the opportunities for State, local and tribal governments to serve on IDTeams.

The group discussed how best to set up space for respectful discourse in large meeting settings and work towards common ground. Ideas included hosting multiple meetings in varied locations, holding meetings in the evening and weekends and offering on-line collaboration tools. It was observed that many people like public meetings while others submit only written comments. There is a need to respect people who don't do for their full time job. The El Yunque has effectively used radio stations, talk shows and local papers to explain what the process is. There is an interest to use more social media.

When asked if any forests embrace the accelerated timeline, the agency answered that there is a need to set timelines and create a sense of urgency and accountability. Some forests will meet their timelines, others will be deliberate in slowing down. Extensions should be the exception rather than the rule. It was also noted that crises tend to develop when a forest hastily releases documents that do not reflect the public's input. It undermines the process when people feel like they haven't been listened and feel that a year's work and people's time wasn't respected.

The committee observed that there are similar issues on all the forests they have interacted with to date. Specific observations include:

The need for:

- collaboratives to extend beyond the planning process through implementation
- reasonable channels of discourse
- forests to start preparing for revisions years out to build and strengthen relationships
- robust public relations plans that engage youth and new audiences
- forests to address social and economic connections
- true governmental engagement
- peer-to-peer learning within the agency
- forests too connect with social scientists and economists
- FACA training for forests and stakeholders
- discussion on the connection between NRV and desired conditions; lack of agency and stakeholder capacity

The importance of:

- cultural and historic resources and how this can pull people together or apart
- people's need to feel heard
- the perceived conflict between 'those that live near the forest and those that don't' or the conflict between 'those who understand the ecological conditions and those that don't' and the need to build open
- having unbiased agency personnel that come to the planning process with any open mind
- the issue of constant turnover in the agency

Public Comment

Jill Gatesman, The Wilderness Society, shared insights on the NP Partnership and the struggle on collaboration with tight timelines. Josh Kelly, Mountain True, hopes that the NP Partnership can catch up with the revision. The forest is very complex and has many visitors. Taking the time to do it right is important. Eddie Reese, NC Forestry Association, stated that timber harvest can help restoration and encouraged forests to be mindful on this during planning.

Dialogue with agency on final directives

Under Secretary of Agriculture, Robert Bonnie, and Special Assistant to the Under Secretary, Meryl Harrell, joined the committee to discuss how the agency addressed the committee's recommendations in the final directives and how the committee can best help the agency with the roll out of the final directives. The agency leadership stated that they are still learning and need the committee's help with developing recommendations on implementation of the rule. To this end, the agency encouraged the committee members to go out and learn how the rule is being implemented across the nation and bring this information back to the deliberations. Advice from the committee can come in many forms. Consensus written recommendations are important but the conversation between the agency and committee is also extremely valuable. The committee can shift agency and actions on the ground just by convening people and asking questions. Problem identification is important while developing solutions takes time.

Agency leadership identified priorities for the committee including: identifying barriers and opportunities for implementation; assisting with outreach because the committee has credibility with stakeholders; facilitating information sharing on lessons learned from early and mid-adopters, identifying information gaps and red flags; helping with assessments, broad scale monitoring and the monitoring transition; interacting with the Tongas Advisory Committee on the amendment process; sharing expertise through learning labs; and deliberating on how the agency can support restoration via planning.

The group discussed the roll out strategy for the final directives. The co-chairs will draft a letter to the Chief and Secretary, a press release and talking points with member quotes supporting the rule; noting the completion of and support for the process that went into the directives; the changes made to the directives embody the intent of the committee's recommendations; the big improvement to specific areas including the wilderness inventory process, the requirement for socio-economic monitoring, and outreach to a broader segment of the American public as a key objective; and that the agency modeled collaborative behavior in working with the committee and the public on the directives. It is important to note that the directives and rule are not a panacea, but do offer the tools and structure for the American people to engage in solving problems together. The documents will then pivot to the committee's continuing role in helping to troubleshoot and engage in joint problem-solving, all in the service of ensuring effective implementation, underscoring that implementation is the goal.

It was acknowledged that this rule is an institutional change for the agency and education is needed. The agency is developing technical guides to address difficult issues like public participation, species of conservation concern, focal species, and socio-economic elements. The committee will have the opportunity to comment on these. The agency will begin hosting learning labs on the directives. They will reach out to the committee to identify topics for issue-related calls and members will be able to

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participate in these. The group also discussed the opportunities for external webinars to present the directives to stakeholders.

The committee discussed opportunities for members to serve as ambassadors, doing outreach in their own communities. The facilitation team will assist the committee in developing a calendar of speaking opportunities. A PowerPoint presentation will be created based on language from the Guides and talking points that members can use at speaking engagements.

The group agreed that all the committee's products should have a similar look and feel. The Outreach workgroup will work with a graphic designer on contract with the agency on the formatting and look of committee products. Ancillary products such as shorter guides targeted to specific audiences may be produced in the future as well.

The next committee meeting will be held in Washington DC allowing a delegation from the committee to participate in additional hill briefings and participation in a national restoration workshop.

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