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Subject: California Spotted Owl Conservation Strategy Project Initiation Letter
To: California Spotted Owl Conservation Strategy Team

The California spotted owl (CSO) has long been a species of conservation focus in the Pacific Southwest Region of the Forest Service, with the species having been designated as a Forest Service Sensitive Species in the late 1970s. In July 1992, the Pacific Southwest Research Station (PSW) published *The California Spotted Owl: A Technical Assessment of Its Current Status* ("CASPO Report"), which provided the scientific foundation for conserving the species for the last 23 years. Since the publication of the CASPO Report, a great deal of scientific information and management experience have developed that warrant a renewed look at the best means of conserving the species. And, given the importance of species conservation to the development of revised Forest Plans, a new Conservation Strategy for the CSO can help guide the current revision of Forest Plans in the Sierra Nevada.

The Region took the first step toward developing a Conservation Strategy by partnering with PSW to summarize the state of knowledge relative to the CSO. PSW has taken the lead in this effort and has devoted the last year to preparing a Conservation Assessment of the CSO, which is expected to be completed this fall. This Assessment will provide essential scientific information to support the Conservation Strategy.

Because a robust and implementable Conservation Strategy requires more than a summary of the existing science, I have convened a team of experienced managers and scientific advisors to pick up where the Conservation Assessment left off. As members of that team, your charge is to develop a Conservation Strategy that will provide for the long-term persistence of the species and the coniferous forests upon which it depends. You are expected to rely upon the best available scientific information and your knowledge of Forest Service land management to craft a strategy that is both scientifically robust and can be implemented on the ground.

I charge the Team to develop a Conservation Strategy for the conservation of the spotted owl within the ecological context in which it lives. It is my expectation that the Conservation Strategy will provide for conservation of the owl in the present while emphasizing the long-term value of restoring Sierra Nevada forests that are more in-line with the natural range of variability and are resilient to climate change and other stressors. I task the team with addressing my concern that a Conservation Strategy solely focused on the retention of densely-canopied forest is likely to exacerbate threats to owl habitat from fire, insects, diseases, and climate change. The Forest Service – and the owl itself – needs a Conservation Strategy that restores the ecological structure, composition, and processes of Sierra Nevada forests that is representative of the conditions in which the owl evolved and in which it is likely to persist over the long term.



Geographic Range

The CSO is distributed in the Sierra Nevada, the mountains of central coastal California, and the peninsular and transverse ranges of Southern California. The vast majority of CSO habitat and individuals are located in the Sierra Nevada. The southern and coastal spotted owls are genetically distinct and appear to be demographically independent of the Sierra Nevada owls. The southern and coastal owls utilize different habitats and face different threats from the Sierra Nevada owls. These differences necessitate different conservation strategies.

In light of my goal to complete a draft Conservation Strategy by March 2016, with a focus on informing the revised Forest Plans for the Sierra Nevada, I have decided to limit the Conservation Strategy – at least in its first iteration – to the Sierra Nevada (and southern Cascades) portion of the species' range, spanning from the Sierra National Forest in the south to the Lassen National Forest in the north. That said, if the Team identifies conservation measures that are likely to benefit not only the Sierra Nevada owl population but also the coastal and southern California CSO populations, it should note such measures in the Strategy.

Expectations

My goal is to have the Conservation Strategy completed by the fall of 2016. I recognize that this is an ambitious schedule for such an important and complex endeavor. However, neither the species nor the Forest Service can wait years for the development of a strategy. Sierra Nevada forests are already dramatically departed from the natural range of variability, and active forest restoration is urgently needed. Furthermore, I intend the CSO Conservation Strategy to be used in the Forest Plan revision process, which is currently underway. Both of these factors warrant an accelerated timeline for the preparation of the Conservation Strategy.

In establishing this ambitious timeline, I recognize that significant uncertainty remains in the scientific and land management fields regarding the best means of conserving the species. And, while I hope developing the Strategy reduces or eliminates some of that uncertainty, I expect that it will take several years (or longer) to settle on the best path forward. Therefore, I expect that the Strategy to be released next year will be the first iteration of an owl conservation strategy. As new information and experience accumulate, the Strategy and/or the projects and plans that rely on it may need to be modified to best reflect contemporaneous scientific information and management experience. Additionally, a later iteration of the Strategy would be the appropriate place to develop any necessary conservation recommendation for the coastal and southern California CSO populations.

Despite the compressed schedule, I expect the strategy to involve public outreach and feedback and be subject to scientific peer review prior to its finalization. My goal is to have a draft Conservation Strategy ready for peer review by March 31, 2016. Between now and then, I expect members of the Conservation Strategy Team to work individually and collaboratively to develop the draft Strategy.

In addition, it is my expectation that the Conservation Strategy be developed in close coordination with other key agencies that have interest in and experience with conservation of the California Spotted Owl and associated forest ecosystems; specifically, the U.S. Fish and Wildlife Service (USFWS), the California Department of Fish and Wildlife (CDFW), the National Park Service (NPS), and the Sierra Nevada Conservancy (SNC).

While the specific content of the Strategy cannot be determined this early in the process, the following are components that I expect the Strategy Team to consider for inclusion in the Strategy document:

- Summary of Key Owl Biological and Ecological Attributes
- Historic, Current, Projected, and Desired Conditions for the Species and Forest
- Habitat Management Recommendations
- Decision Support Tools
- Managing Non-Habitat Threats to the CSO
- Monitoring and Adaptive Management
- Research Priorities

In preparing the Strategy, the Team should draw from the existing scientific literature as summarized in the Conservation Assessment. However, the Team is also encouraged to draw from existing information and experience that is not reflected in the Assessment and any new information that is developed or published in the upcoming months.

I recognize that further spatial analysis and modeling will help develop the Conservation Strategy, and the Region is committed to providing support to the scientists on the Team to develop new information and tools (e.g., spotted owl habitat and demographic models, treatment prioritization models, decision support tools, etc.). However, given the ambitious timeline, the Strategy cannot wait for the development of all potentially useful tools. The Strategy will be released based on the best information and tools that are available by early 2016. To the extent that additional information and tools are developed after that point, the Region will consider modifying and updating the Strategy to stay aligned with the best available information.

Team Configuration

The Team I have convened includes multiple sub-groups and individuals who will work on various elements of the Strategy. The three core sub-groups of the Strategy Team are: (1) leadership, (2) managers, and (3) scientists. Jamie Rosen and Sarah Sawyer comprise the leadership sub-group and are responsible for project management and leadership; draftsmanship and final editing of the Strategy; and ensuring that the Region's vision for the Strategy is communicated to other members of the team and evident in the final Strategy. Ryan Tompkins, Tina Mark, and Carolyn Ballard comprise the manager sub-group and are responsible for developing and drafting management recommendations; coordinating with the scientist sub-group to ensure that management recommendations are scientifically supportable; and coordinating with other Forest Service managers to ensure that management recommendations are understandable and implementable. John Keane, Malcolm North, Zach Peery, and Scott Stephens comprise the scientist sub-group and are responsible for developing new scientific models and analysis; limited draftsmanship and review of scientific portions of the Strategy; review of management recommendations for scientific integrity; and providing ongoing scientific advice and information to the leadership and manager sub-groups.

Aside from the three core sub-groups described above, there are several other technical specialists that are part of the Conservation Strategy Team. These individuals and their roles are noted below.

The following are the members of the CSO Conservation Strategy Team:

Leadership

- Jamie Rosen (FS Regional Office): Natural Resource Specialist - **Team Leader**
- Sarah Sawyer (FS Regional Office): Ecologist - **Project Manager**

Managers

- Ryan Tompkins (Plumas National Forest): Silviculturist
- Tina Mark (Tahoe National Forest): Wildlife Biologist
- Carolyn Ballard (Sierra National Forest): Fire and Fuels Manager

Scientists

- Dr. John Keane (Pacific Southwest Research Station): Owl Biologist
- Dr. Malcolm North (Pacific Southwest Research Station): Forest Ecologist
- Dr. Zach Peery (University of Wisconsin): Owl Biologist
- Dr. Scott Stephens (University of California, Berkeley): Fire Scientist

Information Management & Analytical Support

- Carlos Ramirez (FS Regional Office): Remote Sensing Specialist
- Carol Clark (FS Regional Office): Spatial Analyst
- Jay Miller (FS Regional Office): Fire and Fuels Analyst
- Matthew Bokach (FS Regional Office): Forest Health Ecologist

Public Engagement Support

- Denise Adamic (FS Regional Office): Public Affairs Specialist
- Dr. Debra Whitall (FS Regional Office): Social Scientist

Consulting Experts

- Dr. Wayne Spencer (Conservation Biology Institute): Conservation Planner
- Dr. Susan Roberts (Consultant): Owl Biologist

I expect the Team to predominantly work from their normal duty stations in order to limit travel. However, I recognize the need for a small number of in-person meetings between team members. Regular conference calls should occur to keep communications open.

In addition to the specific team members, I have established a Board of Directors to ensure that the Strategy Team has adequate resources to meet its deadlines and to provide quick feedback on any challenges the Team may face. The Board of Directors will be comprised of the Director and/or Deputy Directors from the Ecosystem Management, Ecosystem Planning, and Information Management Regional Office Staffs.

If there is significant disagreement among team members regarding the process by which the Conservation Strategy is being developed or the substantive content of the Strategy, team

members should bring concerns to the Team Leader, who will raise the issue with the Board of Directors and Deputy Regional Forester Bernie Gyant for resolution.

Outreach

The conservation of the CSO is an important issue not just to the Forest Service, but also to the general public, other federal agencies, State and local government bodies, Native American tribes, and non-governmental organizations. Therefore, the Team leaders should provide interested parties with information about the CSO Strategy as it is being developed, as well as opportunities to provide input to guide the development of the Strategy.

Because the CSO Conservation Strategy will not make any decisions or commitments of resources that directly affect the environment, the Strategy will not be prepared pursuant to the NEPA and its formal procedures for public involvement. Nonetheless, because conservation of the species and the forests in which it dwells is an important issue to the public, I expect the Team leaders, with support from Regional Office Staff and cooperating agencies, to ensure that the public is kept apprised of the development of the Strategy and has opportunities to provide feedback to the agency before the Strategy is finalized. At a minimum, I expect the Team leaders to create a publicly accessible website that contains important information related to the Strategy and to provide the public with an opportunity to review and comment upon a draft version of the Strategy before it is completed.

Timeline and Benchmarks

The timeline and benchmarks for the Strategy are shown below. The Team is responsible to decide how much time is appropriate to address each aspect of the Strategy to meet the timeline. Team members should meet on a regular basis throughout the process and should strive to maintain a schedule free of other time-intensive commitments during the critical timeframes for the Strategy. The Team Leader will have weekly discussions with the Board of Directors to keep them apprised of progress with the Strategy.

You are assisting with a top priority for the Region, so if you need assistance in organizing your time or other work assignments, communicate that need to the Team Leader or Project Manager and your Supervisor. If you struggle with the identified timelines, communicate with the Team Leader or Project Leader and your Supervisor to ensure that Strategy timelines are met to the degree possible.

Below are the main benchmarks associated with developing the Strategy. There are numerous other way-points that are not specifically listed, but are essential to developing the Strategy – e.g., development of draft Strategy chapters, development of draft management recommendations, development of an adaptive management and monitoring plan, key points of public and interagency outreach, etc. The dates for these way-points are too uncertain at this point to pin down. Therefore, I expect the Team Leader and Project Manager to establish due dates for such way-points and all Team members to prioritize their work in order to reach those milestones. Furthermore, I expect the public website to be kept updated to reflect the establishment of important way-points, particularly when such way-points relate to public involvement.

The following are the primary benchmarks for the Strategy:

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| October 2015 | Outreach Plan completed and CSO Strategy website launched |
| October 2015 (expected) | CSO Conservation Assessment completed by PSW |
| October 2015 | CSO habitat selection model completed |
| November 2015 | Conservation Strategy Team in-person meeting |
| Winter, 2015 (expected) | CSO Conservation Assessment published by PSW |
| February 2015 | All modeling and analysis by scientist sub-group completed |
| March 31, 2016 | Draft CSO Conservation Strategy ready for public and peer review |
| Fall, 2016 | Publication of Final CSO Conservation Strategy |

Strategy Finalization and Adoption

I will make the final decision on behalf of the Region regarding finalizing and adopting the Conservation Strategy. That said, I expect that the Strategy will be conceived and drafted through the collective and collaborative efforts of the Team, which is comprised of some of the finest talent on conservation planning and land management, both inside and outside the Forest Service. In developing the Strategy, I expect that the Team will consider the input from the public, other federal agencies, State and local government bodies, Native American tribes, and non-governmental organizations.

Thank you for participating in this tremendously important endeavor. If you have any questions or concerns, please contact the Team Leader, Jamie Rosen (jamie.rosen@usda.gov; (415) 744-3011).

for 
 RANDY MOORE
 Regional Forester Pacific Southwest Region

cc: Deb Whitman, Al Olson, Marybeth Hennessy, Diana Craig, Jayne Handley, Bernie Gyant, Jane Hayes