



United States  
Department of  
Agriculture

Forest Service  
Southern Region

# **Fiscal Year 2007**

## **Monitoring and Evaluation Report**

### **Chattahoochee-Oconee National Forests**



Mtn. Orchard Woodland, Compartment 216, Chattooga River Ranger District, Habersham County GA

**September 30, 2008**



**2007**

**Monitoring and Evaluation Report  
Chattahoochee-Oconee National Forests**

*Exact observations and demonstrated truths.*

**September 30, 2008**

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## FOREST SUPERVISOR'S ADEQUACY STATEMENT

I have evaluated the monitoring results and recommendations in this report. The recommendations will be implemented, unless new information or changed resource conditions justify a change. I have considered and am making funding shifts in the budget necessary to implement these actions. In addition, additional funding has been requested from the Regional Office in response to these recommendations.

We have begun using portions of the monitoring and evaluation requirements associated with our revised Forest Plan as new projects are being implemented. However, some of the monitoring and evaluation recommendations made in this document are still based upon the older Plan, but will continue to guide our priorities until we completely integrate all of our projects under the new approved revised Forest Plan.

*/s/ George M. Bain*

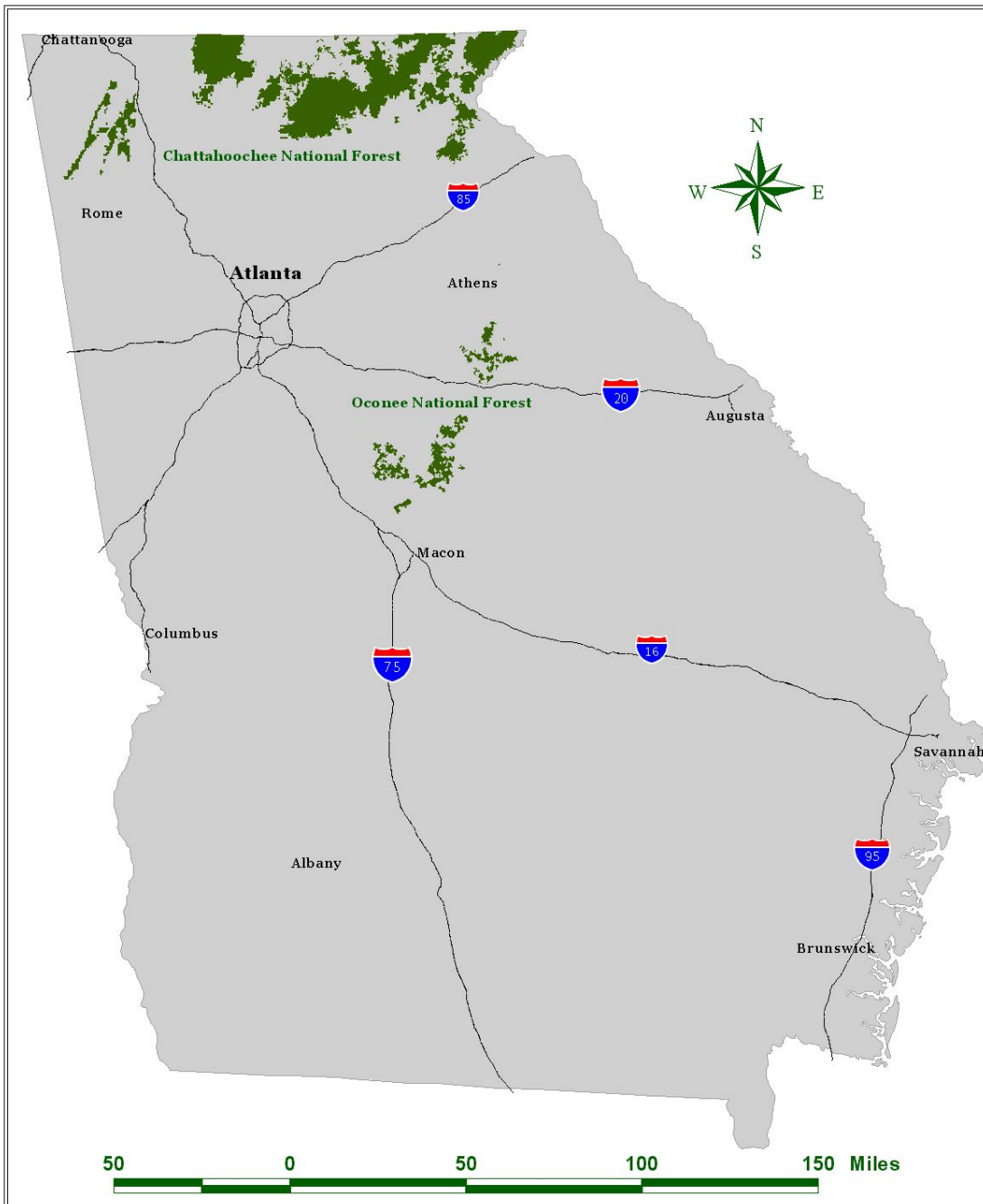
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**GEORGE M. BAIN**  
Forest Supervisor

September 30, 2008

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**Date**



## INTRODUCTION

Monitoring and evaluation provides information to determine whether programs and projects are meeting Forest Plan direction, and whether the cost anticipated to implement the Forest Plan coincides with actual costs. Monitoring and evaluation is required by NFMA implementing regulations (*36 CFR 219.12(k)*) to determine whether requirements of the regulations and Forest Plan are being met.

The Forest Plan Chapter 5 establishes Monitoring Questions that are to be answered over the course of Forest Plan implementation. Monitoring questions address whether the desired conditions, goals and objectives of the Forest Plan are being met and whether Forest Plan standards are effective. Monitoring Questions are part of the Forest Plan and are stated in terms that will direct what will be monitored, but are not so specific as to address how monitoring will be accomplished.

Monitoring Questions will be further refined during Forest Plan implementation into Monitoring Elements and Task Sheets, which are more detailed, specific and measurable than the Monitoring Questions themselves. Monitoring Elements and Task Sheets may be modified and prioritized to guide monitoring activities over the course of Forest Plan implementation. The Monitoring Summary Table and sample Task Sheet (Appendix G) demonstrate the relationships between Forest Plan Goals, Objectives, Standards and Monitoring Questions, and indicate the nature of Monitoring Elements and monitoring details that are to be further developed during Forest Plan implementation. The Monitoring Summary Table and sample Task Sheet are presented here only for information and may be modified as needed to address changes in needs, priorities, availability of personnel and funding.

The concept of adaptive management is foundational for planning and Forest Plan implementation in a dynamic environment. Regulations require that Forest Plans be revised periodically (*36 CFR 219.10(g)*). However, Forest Plans may need to be more dynamic to account for changed resource conditions (such as large storms or insect outbreaks), new information or findings of science, or new regulations or policies. An effective monitoring and evaluation program is essential for determining when these needs may exist and facilitating quick resolution of a need for change.

The Monitoring Questions were developed to address three types of monitoring:

- Implementation monitoring – addressing whether the Forest Plan is being carried out
- Effectiveness monitoring – dealing with whether desired conditions are resulting
- Validation monitoring – to determine if information used in developing the Forest Plan has changed

Monitoring and evaluation provide information that can be used to keep Forest Plans current. Key results and findings will be used to determine if changes are needed in goals, objectives, standards, the monitoring questions themselves or research needs.

Monitoring and evaluation are distinct activities. The monitoring phase generally includes the collection of data and information, either by observation, direct measurement or compiling data from appropriate sources. Evaluation is the analysis of this data and information, and is used to assess if the Forest Plan is being implemented correctly and whether it needs to be changed. Forest Plan monitoring and evaluations (M&E) will be reported annually in the 'Forest Monitoring and Evaluation Report'.

Monitoring and evaluation may lead to adjustments of programs, projects, or activities or to changes or amendment to the Forest Plan itself. Alternatively, they may be used to recommend changes in laws, regulations, and policies that affect both the Forest Plan and project implementation (FSM 1922.7).

Forest Plan amendments and revisions should be responsive to changes that affect the Forest Plan, and may be needed at any time if a Forest Plan becomes out of date in some way. Within an adaptive management framework, the need to amend or revise the Forest Plan may result from:

- Recommendations of an interdisciplinary team, based on evaluation and monitoring results
- Changes in agency policy and regulations
- Planning errors found during Forest Plan implementation
- Changes in physical, biological, social, or economic conditions

The evaluation of findings under the following Monitoring Questions will lead forest managers to these determinations.

M&E documents progress and results of implementing the Forest Plan. This report is for the administrative unit of the Chattahoochee National Forest and the Oconee National Forest considered together as the Chattahoochee-Oconee National Forests.

## **The Process**

Forest Plan monitoring is an ongoing task. Examples of formal monitoring are reviews, functional assistance trips, quality reviews, and specific data collection and analysis. Examples of informal monitoring include daily site visits to projects and visits, telephone calls, and letters to or from the public.

## **Objectives**

Objectives of Quality Reviews are (1) to field examine a sample of activities associated with implementation of the Forest Plan with a full interdisciplinary team and (2) to document resource-specific and activity-specific monitoring results. Monitoring involved is both implementation monitoring and effectiveness monitoring. The reviews focus on answering such questions as:

- Were activities as planned consistent with the Forest Plan?
- Were the activities implemented according to what was planned?
- Upon completion of the activities, were the assumptions correct in both the planning of the project and the Forest Plan?
- Are Standards being applied appropriately, and are they doing what they are expected to do?
- Are mitigations being applied appropriately and working?

## **Evaluation**

- The M&E Team evaluates the findings decides if action is needed, what the action would be, and how to go about it. Needed actions might include training of personnel and writing letters of clarification or a Forest Plan amendment. Even if items are in compliance, monitoring may lead to changes in implementation of future projects.

## **Functional Assistance Trips**

- Within a function (such as wilderness, soil and water, or recreation), Staff Officers and specialists from the Supervisor's Office or Regional Office conduct their own reviews of their resource specialty. These reviews are carried out and checked for consistency with the Forest Plan. The results are documented and used in Forest Plan monitoring.



## **Plan in Hand**

- The Forest has been to implementing these types of reviews beginning in 1985. What they consist of is going out in the Forest, looking and discussing with the implementing Ranger District team, an approved project plan, prior to final implementation.

## **Specific Data Collection and Analysis**

- A great deal of routine data collection and analysis is done on the forests. Examples are mentioned in the detailed monitoring discussions of this report. Shown next are mostly additional examples by resource areas. These are only examples and are not intended to be a complete listing of data collection efforts on the forests. Keep in mind that to monitor you first must have baseline data (inventories) to which to make comparisons.

## **Archaeological/Cultural/Historic Resources**

- Forest personnel carry out archaeological investigations year-round at any forest location that has the possibility of ground disturbance; plus, they perform formal excavations at some previously discovered historic or prehistoric sites.

## **Recreation**

- Fee Collections – Fee collections at developed recreation sites are valuable to monitor recreation-use levels.
- Inventories – Mapping of dispersed (concentrated streamside camping, not informal campgrounds) recreation sites and collecting data on their characteristics is getting increasing attention across the forests. Inventories are used to plan and carry out rehabilitation work and use patterns.
- Traffic Counts – Annual, routine traffic counting on forest roads is an indicator of use patterns, destinations, seasons of use, numbers of visitors, and types of use. Traffic counts prioritize road maintenance needs.
- Visitor Contacts – Conversations with forest visitors at campgrounds, at Wildlife Management Area check stations, at trailheads, at visitor centers, at district offices, and through telephone calls help to quantify and qualify use in situations where fees and trail registers do not give all the information needed to improve the condition of the forest recreation sites.

## Soil, Water, and Air

- Air Quality – Forest personnel are sampling the effects of ozone and atmospheric deposition on forest resources—such as vegetation, water, and soils—in the vicinity of the Cohutta Wilderness. They have collected and analyzed water samples from the Jacks River to assess effects of pollutants. Permanent plots with annual vegetation assessment are used to monitor ozone impacts.
- Ecological Classification – Forest personnel conduct integrated resource sampling on several areas on the forests to develop a multi-resource classification for ecosystem management. Examples of parameters sampled include aquatics, climate, geology, landform, soils, and vegetation.
- Inventories – Forest personnel complete soil surveys on the forests to identify soil types and their properties. They use survey data to develop alternatives for management actions and implement appropriate mitigation techniques to minimize impacts.
- Soil Productivity – Forest personnel examine areas with management activities—that is, timber harvest, prescribed burning, road construction, and recreation uses—during the life of projects to assess impacts on productivity. Surveys provide indication of the amount of area in degraded conditions in need of restoration.

## Vegetation

- Forest Cover – Each year forest personnel inventory a portion of the forests for forest cover composition and condition and the information is updated in a computer database. In the future, this information will be matched with NTMB survey results, PETS species results, and fish/aquatic habitat conditions.
- Reforestation – Forest personnel examine each area reforested at least twice in the first 5 years to ensure that it has been successfully reforested. The results are formally reported to the Secretary of Agriculture.

## Wildlife

- Bear Surveys - Forest personnel cooperate with the Georgia Wildlife Resources Division (GAWRD) in an annual bait station survey for bears. Visitation has shown a steady increase from 1983 through 2006. Likewise, legally harvested black bear numbers have increased and the population has probably reached carrying capacity. At the same time, nuisance bear reports to Georgia wildlife officials have begun to increase.
- Fisheries/Stream Aquatics– Forest personnel monitor several streams across the forests for fish populations and conditions each year. A subset of the streams

sampled have been originally sampled in the 1950s and 1960s. In addition, some streams that are sampled have had, or will have, fish habitat improvement structures constructed to measure the fish response to these efforts.

- Hunting Check Stations – Forest personnel cooperate with Georgia Department of Natural Resources – Wildlife Resources Division (GAWRD) in staffing check stations on Wildlife Management Areas (WMA's) across the forests. They collect data on animal conditions, hunter success ratios, and age structure of game species populations. This is used in Forest Plan monitoring.
- Neotropical Migratory Birds (NTMB) and Breeding Bird Surveys – Wildlife Staff and qualified bird identification personnel collect and evaluate population and occurrence data as it relates to habitats, abundance, numbers of species, and effects of management on all birds that breed within the Forests. In recent years, these birds have been a focus of concern because of population declines in various parts of the nation. We currently are monitoring 200 permanent bird points annually, not including occurrence bird data which is collected all year at any location in or near the forests.
- Proposed, Endangered, Threatened, or Sensitive (PETS) Species Surveys – Forest personnel have surveyed thousands of acres of the forests for PETS species; and they survey more acres each year. The knowledge gained from these surveys has been used to develop risk assessments and Biological Evaluations for parts of the forests and for projects. This data is being integrated into the Geographic Information System (GIS) mapping coverage—such as forest cover, PETS species, and soils—to develop predictive models throughout the forests and to show where further inventories are necessary across the forests.

## RESULTS

Following the table is a narrative that gives a more detailed description of what the team found and its recommendation.

**Summary of Forest Plan Compliance by Monitoring Item  
Year 2007**

Monitoring Question	Brief Description	Meeting Plan Intent	Need clarification/ improvement					
			Management Prescription	Standard	Management Direction	Allocations	Outputs	Goals Identified
1	Rare Communities	Yes						
2	Landscape level composition	yes						
3	Key Successional Habitats	Yes						
4	Terrestrial Habitats	Yes						
5	Aquatic Habitats	Yes						
6	Forest Health Threats	Yes						
7	Federally listed and Viability Concerns	Yes						
8	Demand Species	Yes						
9	Recreation Experience	Yes						
10	Recreation Impacts on Environment	mostly						
11	Wilderness Character	Yes						
12	Wild and Scenic River Condition	Yes						
13	Scenery and Recreation Settings	yes						
14	Cultural	Yes						
15	Watersheds: Maintained and Restored	Yes						
16	Conditions: Wetland, Floodplain, Riparian	Yes						
17	Outputs Compare with Projected	Yes						
18	Silvicultural Requirements	Yes						
19	Plan Objectives and Standards Meeting Purpose	Yes						

