



United States Department of Agriculture




Across the Green Line:

How Forest Service Employees Can Support Local Land Use Planning Efforts



“We have a wealth of expertise and experience to share with local communities that are striving to conserve natural resources while planning for future growth. By working in partnership with local communities, the Forest Service can further assist our communities to make critical contributions to the conservation of open space across the landscape.”

—Thomas L. Tidwell, Chief of the USDA Forest Service



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Across the Green Line: How Forest Service Employees Can Support Local Land Use Planning Efforts

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In support of the Open Space Conservation Strategy of the U.S. Department of Agriculture, Forest Service

Abstract

This desk guide is intended primarily for forest supervisors, district rangers, and other employees of the Forest Service, U.S. Department of Agriculture, who need or wish to participate in planning and open space activities in their local community or geographic region. Our goal is to help demystify the planning process and to outline ways that Forest Service employees can, in coordination with line officers, engage effectively and respectfully in locally led land use planning decisions related to housing development. Included in this guide is a brief overview of legal and regulatory authorities associated with participation in community development planning, a review of basic planning steps in which Forest Service employees can (and cannot) provide valuable assistance, and tips on ways to participate successfully. Also included are case studies, selected references and resources, checklists, and a discussion guide.

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1

SETTING THE STAGE

Why Participate in Local Land Use Planning?

Open space. The term conjures a spectrum of vivid images from rich and beautiful forests and grasslands, to bucolic farms and ranches, to lush wetlands and streams, to refreshing and rejuvenating urban parks and greenways.

Open space is all those and more—land that is valued for natural processes; fish and wildlife habitats; agricultural and forest production; aesthetic beauty; recreation; natural-resource-based jobs; and other invaluable ecological, social, and economic benefits, collectively known as “ecosystem services.”

The Forest Service, U.S. Department of Agriculture (USDA), recognizes the vital need to conserve and protect open spaces across the landscape to help protect water quality, conserve native wildlife, and provide renewable timber and nontimber products, as well as places of scenic beauty and recreation opportunity. The agency has developed a comprehensive Open Space Conservation Strategy (USDA Forest Service 2007a) that embraces the idea of public-private partnerships to sustain open space across the “green line”—the jurisdictional boundary separating a national forest or grassland from surrounding lands.

Why is such a strategy needed? Across the United States, open space is being rapidly developed or adversely affected as more people choose to live at the urban fringe and in scenic rural areas. Nationwide,

more than 57 million acres of private rural forests are expected to undergo a substantial increase in housing density between 2000 and 2030 (Stein et al. 2009). Millions of these acres are located within 10 miles of the boundaries of national forests and grasslands (Stein et al. 2007).

Depending on where and how development occurs, new homes and associated roads and activities can affect wildlife and fish habitats, alter the movement and diversity of wildlife populations, introduce or spread invasive plant species, pollute water and air, induce flooding and erosion, change how and where people recreate on public lands, and increase the potential for harm to people and their property from wildfire.

The *green line* is the jurisdictional boundary separating a national forest or grassland from surrounding lands.



Being involved at the town level is critical to the way the forest is managed.

—Forest Planner Stacy Lemieux,
White Mountain National Forest

Such unintended consequences from urbanization can hinder the ability of the Forest Service to manage lands and resources entrusted to its administrative care, as well as the agency's capacity to help communities sustainably manage their lands.

It doesn't have to be this way. National forests and their neighboring communities

often share common goals and desires for the land and its resources, despite differing missions and demands. Community development can be achieved in ways that consider the values of open space while enhancing community quality of life and economic vitality. Local land use planning decisions are a critical element in the protection and maintenance of biodiversity and other benefits of open space across the landscape.

Forest Service Open Space Goals

The agency's Open Space Conservation Strategy aims to sustain the environmental, social, and economic benefits of forests and grasslands across the landscape by—

- **Protecting** the most ecologically and socially important lands;
- **Conserving** working lands as sustainable forests and grasslands;
- **Expanding** and connecting open spaces in cities, suburbs, and towns; and
- **Reducing** the potential ecological impacts and risks of development.

—*Forest Service Open Space Conservation Strategy (USDA Forest Service 2007a)*

Through active participation and fruitful dialogue with local and regional groups when communities embark on desired growth and development, you, as a Forest Service employee with the guidance and support of your supervisor, can help inform local land use decisions outside National Forest System (NFS) boundaries while building and nurturing valuable relationships for future collaborations.



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Working together across the green line is neither new policy nor new direction. Many Forest Service units and employees have already shown the way for making positive contributions to local planning decisions—by regularly providing data, technical assistance, analysis, expert advice, and recommendations to community planners and developers. The scientific and management experience, perspective, and expertise of Forest Service employees have always represented a tremendous resource for local communities. This knowledge base can be shared in ways that do not overstep legal or regulatory authorities or impose on rights.

Engaging in local land use planning can be complex and challenging for Federal employees. Many employees are unfamiliar with local planning processes and/or unsure of their proper role. Furthermore,

a lot of other agency work needs to be done, with little time or funds to do it all. A challenge for line officers is to find the right local balance and guide employees to a level and type of participation that is both helpful to the community and also within budget and in line with agency goals and needs.

This desk guide is intended primarily for Forest Service employees like you, such as forest supervisors, district rangers, and other employees who need or wish to participate in planning activities in their local community or geographic region. Our goal is to help to demystify the planning process and outline ways that you can, in coordination with line officers, engage effectively and respectfully in locally led land-use planning efforts related to housing development and open space. Everyone with an interest in open space conservation should find the tools and discussions here to be informative and helpful.

Working together across the green line is neither new policy nor new direction.



You Asked For It

Among the Forest Service Open Space Conservation Strategy's 13 supporting actions is a call to increase Forest Service support for conservation planning in local communities. To determine how best to provide such support, we conducted a survey of forest planners and district rangers in 2010 (Lesch 2010). We geared survey questions to increase our understanding of how employees are currently engaging in local planning discussions and how such engagement could be strengthened.

Survey results suggest that participation in local planning discussions is already a vibrant part of the Forest Service culture in many places across the country. Nevertheless, nearly all respondents (97 percent) identified skills, tools, and strategies that could be helpful in improving their participation in local planning discussions, including the following—

- Clearer prioritization and staff assignments to increase opportunities for community outreach,
- Instruction in how to effectively build and nurture partnerships,
- Help in learning the local planning and legal framework, and
- Help in understanding how the Forest Service can participate in local planning discussions without stepping on toes.

This publication takes a step in delivering what was asked for by outlining how, where, and when you can help support local land use planning efforts as part of your official duties and by providing resources for further details and training.

To read the full report, visit the Open Space Strategy Web site at http://www.fs.fed.us/openspace/national_strategy.html.

Why Should I Get Involved?

"If you don't comment on or participate in local planning proposals, then you can't complain about the results."

—District Ranger Jay Pence, Teton Basin Ranger District, Caribou-Targhee National Forest, Open Space Webinar presentation, Session 2, May 2012.

Participation in local land use planning activities supports the Forest Service mission and goals.

- Our motto, "Caring for the land and serving people" specifically embraces providing technical and financial assistance to State and private forest landowners and helping States and communities use forest resources sustainably to promote rural economic development and lifestyles. Forming partnerships to achieve shared goals is one of the agency's guiding principles. View the Forest Service mission and vision online at <http://www.fs.fed.us/aboutus/mission.shtml>.
- The Forest Service Strategic Plan contains a goal to conserve open space; view the strategic plan at <http://www.fs.fed.us/publications/strategic/fs-sp-fy07-12.pdf>.

Land use changes will happen with or without us.

- Growth and development will continue to increase across the landscape, with consequent impacts on and management challenges for national forests and grasslands. If we can help decrease those impacts, we also will help decrease wildfire risk, habitat fragmentation, and fire costs, among other beneficial outcomes.

You are needed.

- You have access to invaluable information that could benefit communities as they plan for the future. You have knowledge of wildlife, plants, soils, hydrology, and forestry, for example. You have experience in conservation and environmental regulation. You have skills that include how to inventory and monitor resources or apply for grants. You also have mapping, modeling, grant writing, and other technological or financial tools that many communities lack.
- You will often find that your local governments and community groups are eager for your input and expertise.

Involvement with local community planning efforts can help you get your job done.

- For example, the new Forest Service Planning Rule (http://www.fs.usda.gov/Internet/FSE_DOCUMENTS/stelprdb5362536.pdf) calls for considering all lands when developing, amending, or revising land management plans. Working together on local planning efforts can help you identify and share information and harmonize agency planning activities with other local, regional, State, and Federal planning efforts.
- When you stay in your community's planning loop, you can better understand and respond to public needs. You can also build relationships and leverage resources to meet shared goals.

Included in this guide is a brief overview of legal and regulatory authorities associated with participation in community development planning, a review of basic planning steps in which Forest Service employees can (and cannot) provide valuable assistance, and tips on effective communication styles. Scenarios pose hypothetical situations that illustrate chapter topics; case studies highlight key features or success stories. Selected references and resources are offered as starting points for seeking more information and assistance. Appendixes provide sample checklists and a discussion guide to examine possible responses to the questions posed in the scenarios.

This booklet is also intended to be a dynamic document, in that *your* experiences, stories, and feedback will enhance our collective ability to protect and conserve America's open spaces. Please share your thoughts at the Forest Service Open Space Web site, <http://www.fs.fed.us/openspace/>, or send an email to openspace@fs.fed.us. You can help build a library of approaches and results that can help us all continue to learn and work effectively for open space conservation nationwide.



Find Out More About Open Space Conservation

Open Space Conservation Strategy—http://www.fs.fed.us/openspace/national_strategy.html.

Forests on the Edge—<http://www.fs.fed.us/openspace/fote/index.html>.

For full citations and additional references and resources, see chapter 7.

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CAN I GET INVOLVED? Laws and Regulations That Support Forest Service Employee Participation in Local Development Planning

Planning Staff Officer Jane Clarification lives in a small rural community adjacent to the national forest. She is aware of an upcoming county planning meeting to discuss a proposal to create a shopping center to service a low-income neighborhood. It seems like a great idea, but Clarification would like to know more about the details. She has some technical reports and maps that the county planners might find useful as they explore traffic patterns and project design. She is concerned that too many vehicles approaching from the south might interfere with elk migration through the meadow; if the entry to the center could be on the north, that impact could be minimized. Clarification hesitates to go to the meeting, however. "I can't participate in an "outside" meeting as a Forest Service official, and I can't even participate as a private citizen because everyone knows I work for the Forest Service," she tells a friend. "I certainly am not allowed to offer them any government-owned maps or data, or influence their decision in any way." Clarification believes she is stuck watching from afar as the center design goes forward without the experience and knowledge she could have shared.

Is Jane Clarification really stuck?

See appendix B for discussion.

Forest Service employees are familiar with how to engage the public when planning for actions on NFS lands. We also have a rich history of assisting local, State, tribal, and other Federal government officials and community groups on a variety of specific issues outside NFS boundaries, such as fire protection plans or road and trail access and maintenance.

Furthermore, as part of their official duties, many Forest Service employees routinely participate in county and town meetings, provide management and research data to other government agencies and tribes, and work closely with private landowners and State foresters to plan for and protect private forests. But many other employees, like Jane Clarification in the fictional scenario, believe that such participation in nonagency work is not allowed, particularly as part of one's job.

Open communication and productive relationships are essential to foster sound land management decisions on both sides of the so-called green line between public and private land. But can you and other Forest Service employees cross that line to actually engage in non-Forest Service planning and development efforts?

It is well known that the Forest Service has no legal authority or objective to make decisions for other legal and administrative jurisdictions, including local planning efforts. However, a number of laws, regulations, and directives enable and encourage you and other Forest Service employees to work *beyond* NFS boundaries, in your official capacity, to further the agency's mission and open space goals while helping communities craft environmentally sound development strategies and projects.

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Anchor Points

Table 1 provides a starting point to aid in your understanding of a few of the basic authorities granted to the Forest Service for on-duty engagement in local, State, tribal, and regional community planning

You Can—

- Articulate the natural resource consequences of various land use options.
- Provide science-based information for local decisionmakers.
- Help identify problems and share possible solutions.
- Bring together people and groups in the interest of developing relationships and partnerships.

You Cannot—

- Serve as a voting member of a planning committee or board of directors.
- Make decisions for non-National Forest System land.
- Take sides or endorse products or services.
- Allow personal bias or views to be represented as the agency's position.

Some Facts About FACA

Some Forest Service employees may be under the incorrect impression that the 1972 Federal Advisory Committee Act (FACA) prohibits agency employees from ever meeting with outside groups, nongovernmental organizations, or individuals—not so. FACA is meant to help ensure that agency decisions are made in a transparent and fair way. The Forest Service must conduct its own planning activities in a participatory and collaborative manner—by keeping meetings open, making materials available, and following specific rules to prevent undue influence on Government decisions affecting public lands. FACA itself does not restrict Forest Service employees from engaging in

nonagency community meetings and planning activities for private and other lands. FACA also does not apply if the agency does not convene the group or set the agenda. Other ethical and legal restrictions on official participation in a non-Federal group do apply, however. The Forest Service's National Partnership Resource Center has a helpful review of key principles and practical advice for complying with FACA (http://www.fs.usda.gov/Internet/FSE_DOCUMENTS/stelprdb5203270.pdf). For questions regarding participation with any particular group, contact your regional or local Office of the General Counsel office or ethics advisor.

efforts. The chart is not all-inclusive. It is not intended to provide legal guidance for specific projects or concerns, and it does not supplant existing laws, regulations, and policies, or promulgate new policy or direction. Consult the cited law, regulation, or program for details.

Consult with your regional Office of the General Counsel office, your local ethics advisor, and your local grants and agreements specialist before entering into any formal arrangements or cooperative agreements.

Ethical Considerations

Among the basic ethical considerations required of all Forest Service employees in the course of their official duties, the following are particularly applicable to participation in outside planning efforts related to community development. If you have *any* doubts or concerns, contact your local ethics and legal advisors.

- Keep your official duties and personal business separate.
- Do not accept gifts.
- Understand that the mere appearance of a conflict of interest makes it a conflict.
- Do not knowingly make unauthorized commitments or promises of any kind that could bind the Government.
- Do not sit on a board of directors or serve as an officer, director, or trustee for a non-Federal group.

If you have any doubts or concerns, contact your local ethics and legal advisors.

Table 1. Brief Overview of Legal and Regulatory Anchor Points for Forest Service Employee Participation in Community Development Planning.

This table highlights first steps in the process of understanding legal authorities associated with participation in community development planning. After reading this table, be sure to review the cited laws, regulations, and policies. Seek assistance from the USDA Office of the General Counsel and your local ethics advisor.

What Can I Do?	Where Does It Say So?
You Can Spend Official^a TIME (in some ways)	
statistical data, surveys; help prepare funding proposals.	<i>Intergovernmental Cooperation Act</i> of 1968, as amended, 31 U.S.C. 6501-6508, Public Law 97-258.
Provide on-the-ground assistance by working with State forestry or equivalent agencies (who manage the funds) for projects on non-Federal forest lands.	<i>Cooperative Forestry Assistance Act</i> of 1978, as amended, 16 U.S.C. 2101-2114.
Disseminate scientific information about planning and conserving open space.	<i>Forest and Rangeland Renewable Resources Research Act</i> of 1978, as amended, 16 U.S.C. 1641-1646, Public Law 95-307.
Serve as a line-officer-appointed agency liaison^b to a local conservation or planning group (but NOT serve as a board member, officer, director, trustee, or general partner), within existing ethical and legal boundaries.	<i>Outside Activities (Ethics Law and Regulations</i> , part V, section B), 5 CFR part 2635, subpart H.
Attend in public meetings to exchange information regarding agency and nonagency plans and projects.	All of the above, by implication. Plus— <i>National Forest Management Act</i> , 16 U.S.C. 1604(a), sections 6 and 7. <i>National Forest System Land Management Planning Rule (2012)</i> , 36 CFR 219.
Attend meetings of a RAC to provide information and advice.	<i>Secure Rural Schools and Community Self-Determination Act of 2000</i> , 16 U.S.C. 7101 et seq., as reauthorized in Public Law 110-343 and Public Law 112-141.
Serve as an agency liaison^b to a watershed council or local water issues group to provide information regarding development proposals affecting a wild or scenic river.	<i>Wild and Scenic Rivers Act</i> , 16 U.S.C. 1271 et seq., Public Law 90-542, section 1281(e).
You Can Spend Agency FUNDS (sometimes)	
Help communities acquire conservation easements and road or trail easements by using the FLP and State forestry agencies.	<i>Cooperative Forestry Assistance Act of 1978</i> , as amended, 16 U.S.C. 2101, Public Law 95-313. <i>1990 Farm Bill</i> , Public Law 101-624, 104 Stat. 3359, as amended by the 1996 Farm Bill to allow for grants to States.
Provide financial assistance and oversight for the establishment of community forests by working through the Forest Service Community Forest Program.	<i>Community Forest and Open Space Conservation Program</i> , authorized in the 2008 Farm Bill, Public Law 110-234, which amends the Cooperative Forestry Assistance Act of 1978.
Work through a RAC to help secure funds for regional restoration or cross-boundary projects that will benefit fish, wildlife, and other resources on NFS lands (e.g., weed control along a county road that passes through a national forest).	<i>Secure Rural Schools and Community Self-Determination Act of 2000</i> , 16 U.S.C. 7101 et seq., as reauthorized in Public Law 110-343 and Public Law 112-141. <i>Wyden Amendment (Watershed Restoration and Enhancement Agreement)</i> , Public Law 109-54, as amended.

CFR = Code of Federal Regulations. FLP = Forest Legacy Program. NFS = National Forest System. RAC = Resource Advisory Council. U.S.C. = United States Code.

^a It is “official” if: The employee is assigned the task by a superior, working on official time, reimbursed for travel expenses, using a Government vehicle, in official uniform, on Federal premises, or invited to participate as a result of his or her official position (NFF and USDA Forest Service 2005).

^b A liaison may not: Vote on matters before the board of directors; hold a fiduciary/managerial position as officer, director, or trustee; accept compensation or otherwise be employed; participate in financial management, fundraising, personnel actions, or membership issues; engage in lobbying efforts or represent the organization’s interests as an intermediary or agent before the Federal Government. Other restrictions may apply. Consult with your local ethics advisor or USDA Office of the General Counsel representative before serving or appointing an employee as a liaison.

Find Out More About Legal and Ethical Aspects

Partnership Guide—http://www.fs.usda.gov/Internet/FSE_DOCUMENTS/stelprdb5193234.pdf.

Partnership Resource Center—<http://www.fs.usda.gov/prc>.

Forest Service Handbook 1509 Grants, Cooperative Agreements, and Other Agreements Handbook/Chapter 70, Partnership Agreements—http://www.fs.fed.us/im/directives/fsh/1509.11/1509.11_70-79.2.doc.

Legal questions—USDA Office of the General Counsel—<http://www.usda.gov/wps/portal/usda/usdahome?navid=OGC>.

Ethics questions—FSEthics@oe.usda.gov.

For full citations and additional references and resources, see chapter 7.



3

WHERE DO I FIT IN?

How To Identify and Get Involved in Your Local Planning Process

District Ranger Joe Curious reads in the newspaper that a new housing development is about to break ground in a forested area within a few miles of the national forest boundary. Curious had never noticed an announcement of an environmental review or public hearing, although he did vaguely recall a request last year from some county official asking for information. Curious had been too busy to respond to the request, but apparently all the zoning and permitting hurdles have now been cleared. Still, Curious wonders what's going to happen to the wildlife that now find shelter in the area about to be cleared, which connects to the national forest by a riparian corridor. His hydrologist wonders how runoff from the new roads and rooftops will affect the stream that flows past the development into the national forest. The fire management officer wonders whether the developers have considered Firewise principles in designing the buildings and landscaping. Curious wishes these concerns could have been addressed before the shovels hit the soil.

Where and how could Joe Curious or his staff have contributed to the planning discussions? Is there anything they can do now?

See appendix B for discussion.



Each State, region, county, and community has its own template for making decisions about land use, but, in general, they follow similar steps that include—

- Comprehensive plans and growth policies (set overall direction),
- Zoning and subdivision ordinances (establish overall standards and criteria), and
- Review of individual proposals.

Each step, in turn, follows a typical path that may include—

- Proposal,
- Technical review,
- Public hearings or informal reviews, and
- Decisionmaking.

Forest Service employees have invaluable knowledge to share throughout the planning process—except for the actual decisionmaking—to help local and county officials, organizations, and landowners understand the potential influence their land use choices can have on the natural landscape, including the lands and resources of their national forests and grasslands. The earlier and more regularly you or your staff get involved in an official capacity, the more opportunities decisionmakers have to make use of your input and expertise.

Forest Service employees have invaluable knowledge to share throughout the planning process....



You Know How To Do This

To put community planning into a familiar context, think of the Forest Service as part of an interdisciplinary team, providing the best scientific and management advice to the line officer (the county or

local authority) who is charged with making the decision. You can provide professional judgment and recommendations, but someone else decides.

Steps and Pathways

Typical decision steps for land development proposals are illustrated in figure 1, indicating those points along the path where your participation could be most valuable. If you are the line officer,

consider participating yourself or assigning employees to some or all of the steps. If you are an employee interested in participating, work with your line officer and supervisor to define your role and level of commitment.

Figure 1. Appropriate involvement: typical land-development decision steps and ways the Forest Service could contribute.



NFS = National Forest System.

Adapted from ICMA and MIVT (2006) and USDA Forest Service, Interface South (no date), Module 3. An updated (2012) edition of ICMA and MIVT 2006 is available at http://www.repi.mil/Documents/Primers/Primer_CollaborativeLandUsePlanning.pdf.

Remember—If you are a local line officer, you are officially assigned to represent the Forest Service in such processes. If you are an interested employee who also participates as part of your assigned duties, you also are representing the Forest Service. Be sure that agency policy and goals are accurately presented in comments and recommendations, and keep the focus on preventing potential impacts might incur to NFS lands and resources.

Government Structures and Planning Processes

To join a planning discussion at the right place and time, it helps to understand both the government structure and the specifics of the planning process steps in your particular area. And that's not always a simple matter. Here's why—

- **States** differ in their approaches to land use regulation and authority over cultural and natural resources.
- States are organized into **counties** or the equivalent (such as boroughs, parishes, or districts), but some of those entities operate as political governing bodies for the communities within their boundaries and others are simply geographic designations.
- Each county typically develops its own planning regulations and processes as prescribed by State laws. Counties might have planning or zoning **commissions** that act only to make recommendations, while retaining decisionmaking authority for a broader county commission—or not.
- Some counties are further divided into independent **towns and cities** with their own governing bodies, such as a city or town council, with or without a mayor, where even more local planning and zoning decisions might be made at watershed and even neighborhood levels. Other towns might be

unincorporated localities that defer to the county level for governance.

- Some counties are further served by **regional councils**, which are nonprofit public agencies dedicated to helping local governments solve regional problems or provide services.

The bottom line—Learn about your State, county, and local governments and planning structures. Get to know the people who occupy decisionmaking positions and maintain open dialogue with them. At a minimum, ask to be kept informed and ensure you are on the right mailing lists so that you have the option to participate in all open and public processes.

The earlier and more regularly you or your staff get involved in an official capacity, the more opportunities decisionmakers will have to make use of your input and expertise.

Planning Commissions and Departments

Regardless of the specific structure, most communities and counties have a planning **commission**, typically appointed by governing bodies. Many communities and counties also have a planning **department**, where professional staff (if they have any) review construction and development proposals. Some staff members have formal land planning experience or training, while others might have scientific or technical expertise; still others have none of the above. The staff members complete the first line of

review to determine the conditions under which a proposal could be approved by the commission (if approval is recommended). Getting the right information to the right staff member at the right time with respect to a proposal's natural resource impacts and mitigation options can be critical—but recognize that the commission is not bound to accept the staff member's recommendations.

—Source: Earney (1998).





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Find Out More About Land Use Planning Processes

Urban interface—improving national forest management by influencing and participating in other agency planning—<http://www.fs.fed.us/openspace/>.

USFS participation in local agency planning: Region 5 (California)—<http://www.fs.fed.us/openspace/>.

Land-use planning and policy, Module 3: trainer's guide—<http://www.interface-south.org/products/changing-roles/changing-roles-notebook/module-3/mod3.pdf>.

A toolkit to protect the integrity of greater Yellowstone area landscapes—<http://fedgycc.org/LandscapeIntegrity.htm>.

Private lands conservation toolkit and training for Wyoming land managers—<http://www.uwyo.edu/toolkit>.

For full citations and additional references and resources, see chapter 7.



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4

HOW CAN I MAKE A DIFFERENCE?

How To Improve (and Fund) Involvement So the Forest Service Voice and Message Can Be Heard

Forest Service Lands Specialist Sally Cautious and Recreation Staff Officer Sam Careful are asked by their forest supervisor to participate in the planning meetings for a substantial housing development being proposed near the national grassland boundary. The developer plans to include an equestrian trail that leads directly to the NFS boundary, where Forest Service management is striving to protect habitat for endangered aquatic species. Cautious and Careful bring thick reports, spreadsheets, and maps to the first meeting. The atmosphere becomes highly charged and emotional, causing Cautious and Careful to feel somewhat defensive and frustrated that their voices aren't being heard. They don't know anyone in the room. "This project could threaten T&E fish and have a huge impact on ROS and EVCs," they worry aloud. "Read those reports and you'll see what we mean." They have to leave early for other pressing Forest Service assignments and have no time to come to any more meetings. Planning for the proposed trail and housing development proceeds without them.

How could Sally Cautious, Sam Careful, and their supervisor have improved their involvement in the project?

See appendix B for discussion.



The Forest Service can be a tremendous resource to communities in planning for open space conservation—bringing experience, knowledge, and expertise in local plants and wildlife, aquatic and soils resources, natural resource management, technology, grant writing, mapmaking, and ability to leverage funds and assets.

Still, Forest Service employees often express reluctance to “step on toes” in local or county planning efforts. Sometimes, although Forest Service employees might be willing and able to step in, their voices may be heard or interpreted in unintended or unproductive ways, or their input ignored.

In some cases—especially in days of shrinking budgets and expanding workloads—agency managers just can't find a way to make such outside work fit into the available funding or staffing, or they view collaboration with local governments as

outside of agency responsibilities, so the Forest Service perspective is not heard at all.

This chapter outlines tips that Forest Service line officers, resource managers, and employees can use to improve their involvement in local land use planning discussions, at whatever level is chosen. A few core ideas help lay a foundation for effective dialogue with the many agencies, organizations, groups, and individuals who share an interest in open space conservation. Options are suggested for expanding the financial and human resource pool to make effective engagement possible.

This is just a starting point. References and links offer a sampling of the innumerable resources that offer a wealth of details, training, and assistance for collaborating across the green line with a clear and valuable voice. Once again, line officers,



Line officers, supervisors, and employees need to work together to craft an appropriate level and type of participation.

supervisors, and employees need to work together to craft an appropriate level and type of participation.

Laying the Foundation for Dialogue

Do Your Homework

- **Know the context.** What other projects are going on in the region? What are the land ownership plans and values of the people in the area? What are the existing zoning and land use ordinances?
- **Know the players.** Who else in the region is already doing related planning, conservation, or restoration work? Who else is involved in the project (realtors, local landowners, organizations, industries, government officials, etc.)? Who are the decisionmakers?

In politically and emotionally charged arenas where the stakes are high for all concerned, and you have 5- or 10-minute opportunities to speak, keep your cool.

—Retired Minerals Officer and Law Enforcement Officer Gary Earney (Earney 1998)

Kindly Remind Me: What *Can I Do?*

See the previous chapters on legal authorities (especially table 1) and planning processes (especially figure 1) for the kinds of participation that can be helpful to communities and planners. Here is a review of some ways to share Forest Service perspective and knowledge regarding open space:

- Provide written comments, in professional but plain language.*
- Provide information at public hearings and local meetings, including maps and technical data.
- Participate in scenario-based workshops that are designed for information-gathering purposes.
- Share information about plans for National Forest System (NFS) lands; discuss how these national plans might be integrated into or complemented by local plans.
- Provide information to interagency coordinating groups on topics such as impacts of activities on NFS lands, wildfire protection, fish and wildlife habitats, and the like.

- Serve as a liaison to a local conservation or planning group or watershed council to exchange data and information.
- Speak to local environmental groups or host a community forum at your district office.
- Help secure technical assistance on how to prepare maps or proposals.
- Disseminate scientific information about resources, planning, or conserving open space.
- Work through various agency staffs to procure funds under certain circumstances, such as to purchase conservation or trail easements.

* Some formal actions, such as providing official written comments, must be signed by a line officer. Be sure to work closely with your line officer and supervisor when preparing formal responses or considering any direct contact with the media.

- **Know the process.** Understand your local planning structure (see chapter 2) and the ground rules for hearings and meetings.
- **Know the facts.** Find out ahead of time as much as you can about proposed projects, the key issues, and environmental rules and regulations. Be familiar with current and expected local, regional, and national Forest Service plans, projects, and positions on the relevant issues.

Engage Early and Often

- **Be proactive, not reactive.** Don't wait until the planning commission is about to hold a hearing on a pending project proposal. Ask in advance to be included in important meetings and hearings, and ask for the opportunity to comment on or provide technical assistance for draft plans or environmental impact studies. Get on the right mailing lists to stay informed.
- **Meet and get to know** your local planning and development staffers, as well as community leaders and conservation organization staff; get together regularly to monitor proposed projects or zoning changes and share information.
- **Be strategic.** To stay abreast of what's happening and to demonstrate your interest in the big picture and the longer view, attend as many public meetings and hearings as you can afford.

Build and Nurture Relationships

- **Don't rush it.** Dialogue is built on trust and respect nurtured over time. Create a foundation for solving complex issues in the future by starting a fruitful dialogue with partners today—including all the relevant stakeholders, from environmental and industry groups to local landowners, business leaders, and public officials. Even if individual participants change over time, strong relationships built among groups can last indefinitely.

- **Talk in plain language.** Avoid acronyms and jargon.
- **Listen.** Learn what others—such as local and regional land trusts—have to share. Hear what people are asking for so you can target your contribution accordingly.
- **Treat others as equals.** Respect and learn about the culture and practices of the other agencies, organizations, tribes, and community members with whom you are collaborating.
- **Accept your role.** You are a technical expert. Someone else is the decision-maker.

Keep Them Coming Back for More

- **Be helpful.** Provide consistent, reliable, clear information to your audience in a way that can be easily understood. To help the community understand the information and the agency’s perspective, write summaries or memos instead of providing large technical documents.
- **Be specific.** Explain your concerns and their implications for the public’s natural resources. For example: Is the project a threat to big game winter range? If so, why, how, and where? How specifically might the housing development be modified to mitigate that concern; for example, could they move the subdivision a mile to the north or concentrate the development to leave a larger wildlife migration corridor?
- **Be professional and objective.** Focus on the issue at hand and on how NFS land and resources could be affected. Avoid aligning with any one side. Be polite, respectful, and flexible and keep your personal opinions, emotions, and ego to yourself.

- **Be transparent.** To avoid any perception of secrecy or deception, be open, honest, truthful, and straightforward.

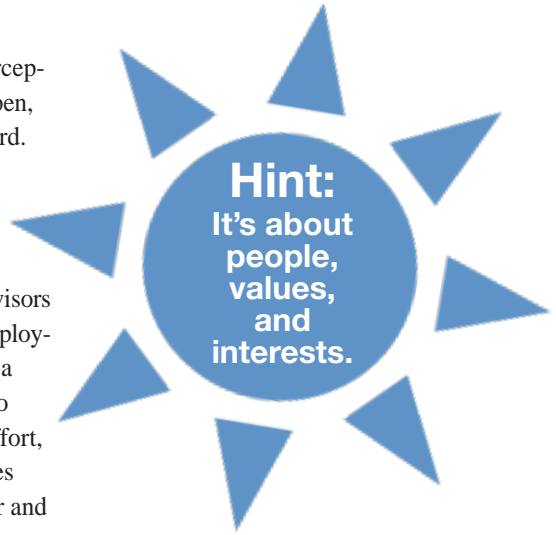
Finding Time and Funds

Time and funds can present daunting hurdles that might be cleared if supervisors and line officers work closely with employees to make community engagement a priority. In deciding how and when to participate in a particular planning effort, consider the benefits to NFS resources that could result from providing clear and helpful input to local planning decision-making processes. By influencing how and where growth occurs in and around NFS lands, we can reduce potential impacts and perhaps achieve greater value than we could with some more traditional work we might have done with the same dollars.

You may need to seek or shuffle funds and projects so that you or other employees can participate in meetings and activities with the guidance and support of your supervisors. A number of tools can help expand the base of hands and dollars to achieve common agency and community goals. A few examples follow.

Do the Assignment Shuffle

- Allocate employee time for community planning efforts that relate to the employee’s existing job description and job code; for example, a biologist could contribute information about fish and wildlife to a community planning commission, and a district ranger (funded by numerous job codes and working under a range of authorities) could participate in community planning meetings covering many topics.
- Consider taking something off the plate. For cases in which a proposed land use change could affect critical NFS resources, freeing up employee



Forest Service employees often express reluctance to “step on toes” in local or county planning efforts.

time to provide input might actually reduce the workload over time because impacts could be mitigated in advance.

- Choose carefully the projects in which you get involved.

Time and money can present daunting hurdles that might be cleared if supervisors and line officers work closely with employees to make community engagement a priority.

Partner Up

Actively seek and nurture partnerships to share costs and tasks. Collaboration among diverse stakeholders can go a long way toward resolving conflicts, pooling resources, and enlisting community support for open space conservation. Partnerships also open up critical connections and relationships for increasing trust and opportunities for future collaborations.

Seek mutually beneficial projects and activities in which you can not only achieve a tangible goal but also help strengthen local capacity. Work closely with your partners to make things happen. The Forest Service has extensive experience in forming, nurturing, and sustaining community-based partnerships. For starters, visit the Forest Service Partnership Resource Center (<http://www.fs.usda.gov/prc>) and the Forest Service Interface South Web sites (<http://www.interface-south.org/products/changing-roles>).

Dig Into the Funding Toolbox

The Forest Service has numerous tools available to seek funding for projects and formal partnerships with nonagency

entities on issues related to conservation of open space. Many other tools are also available outside the Forest Service (see chapter 7), but here are a few ideas for funding possibilities by using our agency—

- **Land and Water Conservation**

Fund. The Land and Water Conservation Fund (LWCF) was established to assure accessibility to outdoor recreation, purchase wilderness inholdings, and protect other important lands for public benefit. Funding derives from offshore oil and gas royalties and is used by multiple agencies including the Forest Service, Bureau of Land Management, National Park Service, and others. Forest Service Lands staff members administer certain LWCF funds for land acquisition by using a highly competitive, two-stage (regional and national) process. For criteria and process details, visit the Forest Service LWCF Web site at <http://www.fs.fed.us/land/staff/LWCF/>. LWCF also provides smaller grants to State and local governments to support the planning, purchase, development, and protection of recreation-oriented lands and projects. For more information on LWCF's local programs visit the National Park Service Land and Water Conservation Fund Web site at http://www.nps.gov/nrcr/programs/lwcf/fed_state.html.

- **Conservation Easements.** The Forest Service Forest Legacy Program (FLP) administers certain other LWCF funds, primarily for conservation easements held by State forestry agencies. Conservation easements are legal agreements between willing landowners and a land trust or government agency that permanently limit the uses of the land while keeping the land in private ownership. Most FLP conservation easements restrict development, require sustainable forestry practices, and protect other values. To be effective, conservation easements must be

What Is a “Partner”?

Federal policy defines partnerships as “arrangements that are voluntary, mutually beneficial, and entered into for the purpose of mutually agreed upon objectives” (NFF and USDA Forest Service 2005). The Forest Service broadly interprets that definition to mean relationships between the people, organizations, agencies, tribes, and communities that work together and share interests. We frequently work with partners either formally (by us-

ing signed agreements and other tools) or informally (by conducting activities that may serve as a springboard for formal arrangements later). For example, many agency employees participate in community networks to offer educational events and share skills and expertise with local citizens without a formal documented arrangement.

—Source: *Forest Service Partnership Guide* (NFF and USDA Forest Service 2005).

monitored and enforced in perpetuity. Since FLP became authorized to provide grants to States in 1996, nearly 350 projects nationwide have protected more than 2 million acres of environmentally sensitive forest lands. For details, visit the FLP Web site at <http://www.fs.fed.us/spf/coop/programs/loa/aboutflp.shtml>.

- **Community Forest Program.** The Community Forest Program protects forests that are important for people and the places they call home. Community forests provide many benefits, such as places to recreate and enjoy nature; protection of habitat, water quality, and other ecosystem services; and economic benefits in the form of timber resources and other forest products. Community forests have also been long-term sites for environmental and cultural education. A new competitive grant opportunity aims to protect important private forests that are threatened by conversion to nonforest uses. Through the Community Forest Program, the Forest Service can provide financial assistance to local governments, tribal governments, and qualified nonprofit entities to establish community forests that provide continuing and accessible community benefits. Community engagement is key. For more details, visit the Community Forest Program Web site at <http://www.fs.fed.us/spf/coop/programs/loa/cfp>.
- **Other.** Numerous other agency tools are available to help fund and facilitate the conservation of open space, including land exchanges, sales of facilities and land (limited authority), donations, rights of way, Memorandums of Understanding, and cost-sharing agreements. Each has its unique limitations and opportunities. For details and information about restrictions, contact your local lands staff or the Forest Service Intranet Lands and Realty homepage at <http://fsweb.wo.fs.fed.us/lands/>;

also check with your local grants and agreements staff or the Intranet Grants and Agreements homepage at <http://fsweb.wo.fs.fed.us/aqm/grants/>.

For additional information about the legal authorities behind these tools, see chapter 2.

Actively seek and nurture partnerships to share costs and tasks.



Land Trusts: An Example of Effective Partnerships

A land trust is a private nonprofit organization that actively works to conserve land by undertaking or assisting in voluntary land or conservation easement acquisitions, or by its stewardship of such easements. Land trusts work closely with landowners and communities to conserve land strategically by accepting donations of land; purchasing land; negotiating private, voluntary conservation agreements on land; and taking care of conserved land. Most land trusts are community based and deeply connected to local needs, so they are well-equipped

to identify land that offers critical natural habitat as well as land offering recreational, agricultural, and other conservation value. About 1,700 land trusts across the country have more than 100,000 volunteers and 5 million members. In the past decade alone, land trusts nationwide have helped conserve more than 2 million acres per year. For details about differing kinds of land trusts, how they work, and where to locate one near you, visit the Land Trust Alliance Web site at <http://www.landtrustalliance.org/>.

Find Out More About Partnerships and Collaboration

Publications

Partnership Guide—http://www.fs.usda.gov/Internet/FSE_DOCUMENTS/stelprdb5193234.pdf.

Partnership Resource Center—<http://www.fs.usda.gov/prc>.

Making collaboration work—<http://www.snre.umich.edu/ecomgt/pubs/documents/collabwork.pdf>.

A toolkit to protect the integrity of greater Yellowstone area landscapes—<http://fedgycc.org/LandscapeIntegrity.htm>.

Private lands conservation toolkit and training for Wyoming land managers—www.uwyo.edu/toolkit.

Online training modules

Interface South, Changing Roles

Land-use planning and policy, trainer's guide, module 3—<http://www.interfacesouth.org/products/changing-roles/changing-roles-notebook/module-3/mod3.pdf>.

Communicating with interface residents and leaders, trainer's guide, module 4—<http://www.interfacesouth.org/products/changing-roles/changing-roles-notebook/module-4>.

Partnership Resource Center

Numerous training modules for developing strong partnerships—<http://www.fs.usda.gov/detail/prc/tools-techniques/partnership/?cid=stelprdb5335621>.

For full citations and additional references and resources, see chapter 7.



5

WRAPPING IT UP

Crossing the Green Line: Possible, Proactive, Productive

Working together across the green line can be an important way to help the agency and local communities achieve mutually beneficial goals as we strive to protect and conserve open space and reduce potential ecological impacts from the development of new housing.

It's possible. Numerous laws, regulations, and agency direction support the participation of Forest Service employees in community planning efforts in a variety of ways.

It's proactive. Awareness of local planning processes and knowledge of the people who make that process happen can enable employees to engage proactively in local planning activities at the most effective times.

It's productive. Our dialogues can be more productive if we are prepared,

objective, and ready to build and nurture relationships over the long term. Funding will always be a challenge, but when employees, supervisors, and line officers put their heads together, options often emerge for careful and considered support of local planning efforts, particularly through building strong and lasting partnerships.

And it's important. We are responsible for the stewardship of NFS lands and for serving the public. By sharing our collective knowledge, experience, and expertise to inform how and where growth occurs in and around NFS lands, as Forest Service employees, we can help reduce potential impacts on the natural and cultural resources in our care, serve our communities as they strive to achieve a high quality of life, *and* help ensure the protection and expansion of open space across the landscape.



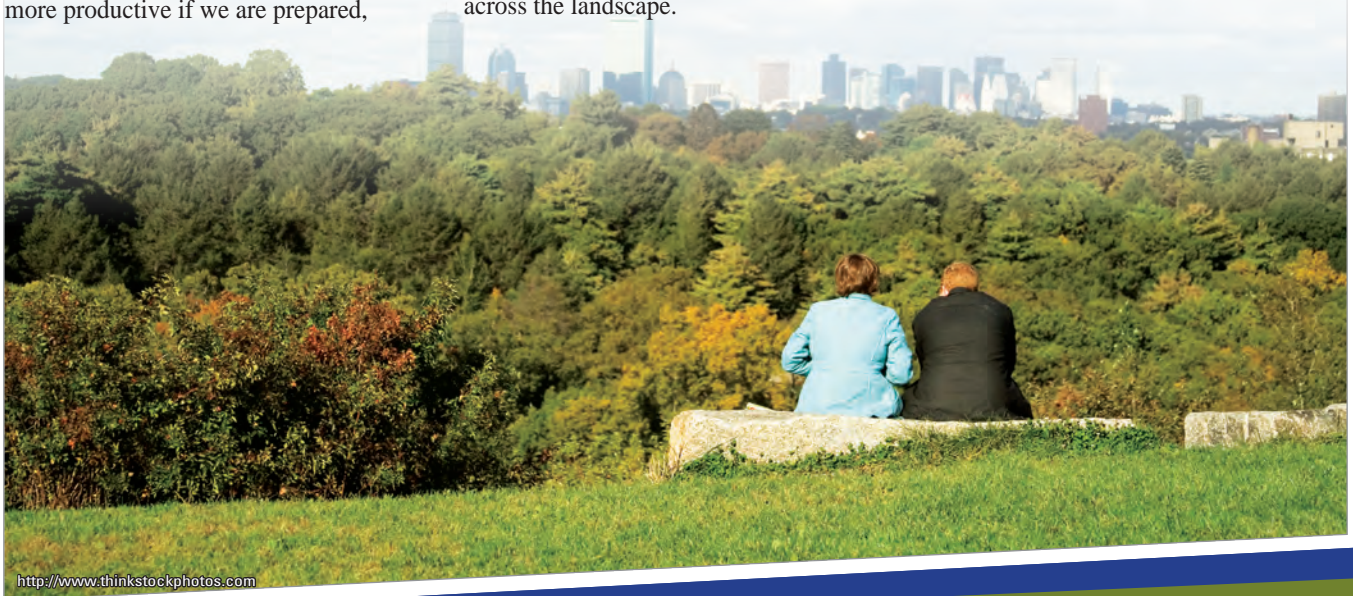
Find Out More About Open Space Conservation

Open Space Conservation Strategy—

http://www.fs.fed.us/openspace/national_strategy.html.

Forests on the Edge—<http://www.fs.fed.us/openspace/fote/index.html>.

For full citations and additional references and resources, see chapter 7.



6

WHAT WORKS? WHAT DOESN'T?

Case Studies

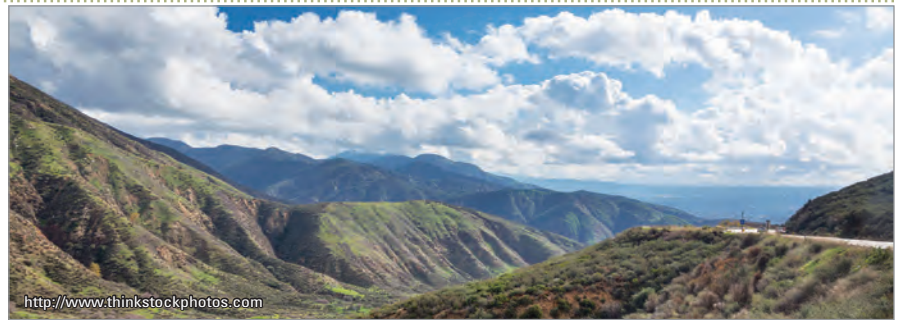
Case Study 1. A California Horse Trail Tale: Win-Win Can Work

This case study is based on a memo from Gary Earney (Earney 1998), now retired from the San Bernadino National Forest in California. Earney's multiple perspectives as forest special uses team leader, minerals officer, and law enforcement officer provided invaluable lessons for, and on-the-ground examples of, participation in local and regional planning efforts. The story presented here combines several of Earney's experiences over an extended period of time into a single composite case study to illustrate both what can happen and what can be done.

Subdivisions in front country areas of our district were increasingly being located in the mouths of canyons, where some of our most critical riparian and wildlife habitat areas are located. Some development plans proposed open areas, parks, or greenbelts with trails and roads that led up to the NFS boundary and just stopped.

In one situation, the end point of an equestrian trail connected to the creek at the mouth of the Cucamonga Canyon—an area with a critical riparian resource where increased human use would be detrimental and where we would never have allowed such trails on the NFS side of the boundary. Connecting the developer's trail network to the national forest presented a nightmare of increased public access where it was not appropriate and could have reduced our flexibility to manage that area of the forest.

The developers were advertising the subdivision's trail system and the proximity to the national forests as a selling point, and they touted their environmentally friendly support of open space and recreation opportunities.



In our comments and discussions with the developers and the community, we emphasized that general uses of most land within the national forest were welcomed. We noted that the specific location of the proposed trail system, however, could damage the very species and resources being highlighted as positive attributes of the subdivision. We pointed out a variety of planning requirements that could mitigate these impacts, such as design or layout changes to the streets and lots, fencing, and various types of barricades that could be aesthetically achieved. We asked that the development include adequate open space within its *own* boundaries.

Furthermore, we emphasized that if they advertised coordinated recreation uses on NFS lands as feasible and desirable, they would have to plan for these uses in

a responsible manner, complying with the forest plan, which had been crafted with public input in the first place. They would have to locate trails where no adverse impacts would occur on sensitive riparian or wildlife areas.

We also asked that the developers investigate other recreation opportunities in the area; for example, a nearby community plan included a broad spectrum of regional recreation opportunities, including a vast multicomunity equestrian network.

By contributing in these ways, we successfully directed community horse trails away from the national forest boundary and into the existing network, thus reaffirming in a positive way the developer's intent to provide attractive recreation opportunities while protecting natural resources on public lands.

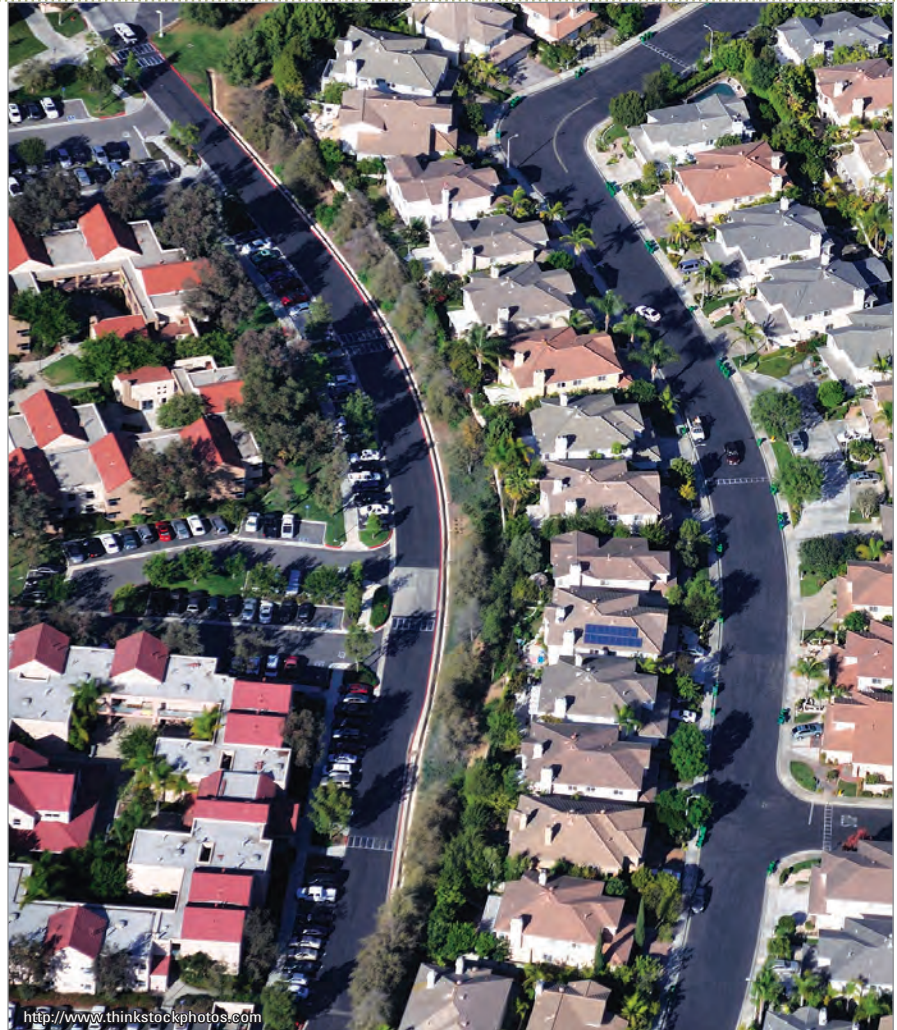
Case Study 2. Be Right About Roads and Your Rights-of-Way

This case study is based on a memo from Gary Earney (Earney 1998), now retired from the San Bernadino National Forest in California. Earney's multiple perspectives as forest special uses team leader, minerals officer, and law enforcement officer provided invaluable lessons and examples for participation in local and regional planning efforts. The story presented here combines several of Earney's experiences over an extended period of time into a single composite case study to illustrate both what can happen and what can be done.

I have learned the hard way not to simply sign a quit-claim deed to a national forest right-of-way. I thought it was pretty clear-cut—A new, nongated, subdivision was being planned for an area where a right-of-way existed that enabled the public and agency personnel access to the national forest. The planned subdivision would have public streets that anyone (including the Forest Service) could use to get to the forest boundary. Why keep a formal right-of-way if everyone could use the public road anyway? So, we gave it up.

For a while, the public and the Forest Service used that subdivision's public streets to access the national forest boundary. Later, the city decided that it did not like that area of the forest being used by the public during fire season because of wildfire threats to the community. The city closed the streets to all public entry except for residents. Still later, the city *permanently* gated the public—and the agency—out of that area of the forest unless traveling by foot, bicycle, or horseback.

In the future, if I give up a Forest Service right-of-way, it will be replaced by an equal or better right-of-way. The right-of-way may still be a public city street (to fit in with the community), but we will retain the right of our users to pass over that public street by having a formal, replacement, deeded right-of-way that is the same alignment as the new public street and that allows general public



recreational use of the road and provides an access status of Government Use Unrestricted for management purposes.

In a second situation, in a location outside the national forest boundary, we did *not* have a right-of-way to use an existing road that was a primary access road to the ranger district. We successfully asked the city to require the developer to relocate the road (still attaching it to the portion

that was actually on-forest) and provide a title or an easement for the road to the city; the Forest Service agreed to maintain it.

Even without formal rights-of-way, perimeter roads can simultaneously serve multiple purposes such as fuel modification, emergency access, and the like. We can help the developers by suggesting creative placement and use of roads that will enhance and secure public safety.

Case Study 3. A Small Island in the Great Plains: Working Together in the Black Hills

This case study comes from retired Planner Frank Carroll of the Black Hills National Forest, compiled from his responses to the Forest Service 2010 survey of local planners and district rangers (Lesch 2010).

“We are a small island in the Great Plains.”

So explained Planner Frank Carroll of the Black Hills National Forest as the motivation for the Forest Service’s robust ongoing participation in local planning efforts. “We consider the area to be a small neighborhood where people need to work together. No individual landowners can do anything without affecting other communities.”

Employees at the Black Hills National Forest support and work with the community in a variety of ways. Local Forest Service employees often lead fire planning efforts and help on other kinds of emergency planning, such as running

simulations on a wilderness area near Mt. Rushmore to evaluate potential development impacts. Forest Service employees have worked with the State to develop State forestry plans (critical to the community’s ability to receive funding by using the Forest Legacy Program), and district rangers routinely participate in county planning meetings.

One example was the Black Hills 2010 Initiative in which local communities began long-range planning for future development, and Forest Service employees participated in numerous planning discussions at State and local levels. Thanks to their powerful information platforms (based on geographic information

systems, or GIS, and Forest Service Activity Tracking System, or FACTS) used for national forest transportation planning, the Forest Service also was able to complement planning work at the local State Department of Transportation.

Like many other national forests, the Black Hills National Forest has an interspersion of public and private lands within its boundaries; outside, the increasing fragmentation of private land into smaller parcels is affecting access to the national forest. One approach the Black Hills National Forest management team has taken to address this land use issue is to help facilitate the acquisition of private lands for public purposes. The national forest collaborated with the Rocky Mountain Elk Foundation. The foundation bought the parcel in question and then transferred ownership to the Forest Service, along with water rights to maintain open access.

At times, the Black Hills National Forest staff has worked with local planning decisionmakers to inform them about how specific community planning decisions can affect the national forest and its public resources. At other times, the staff simply acted as good neighbors, providing advice, counsel, expertise, and whatever technical assistance they could.

“We can’t address our common issues without working together,” said Carroll. While staffing and funding are an ongoing challenge, “It’s a question of priorities,” he stated. At the Black Hills National Forest, employees are finding ways to prioritize and make it work by working together.



Case Study 4. Putting in the Time: Making and Taking Opportunities To Get Involved

This case study comes from retired District Ranger Brent Botts of the Pike-San Isabel National Forest, compiled from his responses to the Forest Service 2010 survey of local planners and district rangers (Lesch 2010).

Pikes Peak Ranger District on the Pike-San Isabel National Forest in Colorado is considered to be a fairly urban district. The area has undergone substantial development in recent years, in part from rapid population growth around 2010 at local military bases. District Ranger Brent Botts began working immediately with the local government on issues related to access and impacts from new housing developments near the national forest.

Botts did not participate in making decisions, but instead was primarily involved in reviewing requests for permits to the zoning board. He had participated in their meetings over the years whenever they pertained to anything adjacent to the national forest, not just new housing developments. District employees were also invited to many planning meetings, and they worked with the local planning community on a regular basis.

Often, Botts and his staff were asked to review and comment on proposals the zoning board was considering, and the wildlife, lands, and recreation staff often provided opinions on potential impacts to the national forest. Fire management specialists provided advice on wildfire protection for new subdivisions. They have not done geographic information systems (GIS) mapping directly for local governments, but they have allowed use of Forest Service data and GIS layers by Colorado utility companies, the Colorado Department of Transportation, and county wildfire protection planning efforts.

In one example, the local municipal utility company, which owns a large inholding within the national forest, wanted to open a watershed that had been closed by the utility company in the past to public use; utility management personnel asked the Forest Service to look at how the use of the national forest might change as a result. The recommendations provided by the Forest Service biologist helped to shape the trail location on the utility company's land.

In another situation, a group bought a ranch and asked for a zoning change based on recreation access to the national forest. The district ranger was involved in the permitting process from the beginning, which helped manage expectations and secure a mutually acceptable solution.

“We have tried to solve problems upfront by coordinating and planning across boundaries,” explained Botts. “For example, if there was an issue with bighorn sheep from another landowner's proposed action, we would work with them to try to avoid adverse impacts.”

“Sometimes a group might consider the Government to be a red-tape barrier,” he noted, “so they don't invite you to participate. You need to build trust with the local community in order to be invited to participate in local planning efforts. There are a lot of opportunities to get involved in external planning processes; you just need to put in the time.”



Case Study 5. Planning Partnerships for a Wild and Scenic River: Skagit Watershed Council

This story of the Skagit Watershed Council highlights the role the Forest Service can play in advising local planning groups with wild and scenic river issues on private lands within the Skagit River Wild and Scenic River System corridor. The content is excerpted from *Beyond Boundaries: Resource Stewardship in the Skagit River Basin* (MBS 2001), which explores the power of partnerships between the Mt. Baker-Snoqualmie National Forest in Washington State and its local communities.

“**T**he Skagit River Basin has a long history of people working together on a wide range of resource management issues. The Forest Service has a stake in the condition of the entire landscape, since the resources we manage both affect and are affected by activities outside national forest boundaries....

Watershed restoration is a cornerstone of Forest Service management direction in the Pacific Northwest, where declines in fisheries and water quality have resulted from the disruption of natural systems.... Since the mid 1990s, a watershed-scale approach to restoration has been used in the Skagit, creating both incentive and opportunity for extensive partnership efforts.

Salmon once swam the Skagit River by the millions, but today salmon and trout are found in only a fraction of those numbers. There are many causes for the decline and many opinions about potential solutions. However, few would argue that for restoration actions to be effective, they must be coordinated across landownership and jurisdictional boundaries....

Early in the 1990s, several organizations in the Skagit began meeting informally on sub-basin and watershed-scale issues. Over time, these groups evolved as people became familiar with each other and the interconnected nature of their interests and concerns. The Forest Service helped to coordinate informational meetings among agencies and organizations as part of the interim watershed assessment process

under the Northwest Forest Plan. By 1997, these relationships were formalized as the Skagit Watershed Council. This umbrella organization of 38 members with disparate interests, missions, and philosophies had one overriding common interest: the restoration of the Skagit River watershed and its resident salmon.

...The council supports voluntary restoration and protection of salmon habitats and the natural processes that form and sustain them. Through collaboration, technical assistance, and education, the council seeks to fulfill its mission.... The Forest Service supports the work of the council with contributions of staff time and financial assistance.

Among the tangible results of this partnership effort is the council’s highly regarded restoration strategy.... Less visible but equally important are the relationships and history of working together that have developed.

This is our story, on this landscape, but it is part of a bigger picture. Nurturing partnerships at all levels will become even more important as emerging issues reach across regional, national, and global boundaries. It will be essential not only to *have* partners but to *be* partners in the important work of caring for the land and serving people.”

In the Skagit Wild and Scenic River System in Washington State, 50 percent of the designated corridor is in private ownership. Forest Service employees frequently meet with landowners and other partners to provide information during planning efforts, monitor activities and their impacts on river values and resources, and provide technical assistance.



7

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Other Resources

Numerous resources for training, information, and guidance about collaboration, planning, and development issues are available online and through various programs and organizations. The following suggestions are only a starting point to steer you toward Forest Service and partner programs of particular relevance for you and your community. You can follow these leads as you begin your search—and if you know of other especially helpful resources, please share them on our Forest Service Open Space Conservation Web site, or by email to openspace@fs.fed.us.

Forest Service, Open Space Conservation Web Site—<http://www.fs.fed.us/openspace/>.

The Open Space Conservation Web site contains a wealth of information on open space conservation tools and practices, including recordings and electronic slides from the monthly Webinar series (*Planning for Growth and Open Space Conservation*) and links to related tools, success stories, and publications produced by and in collaboration with Forest Service scientists.

Forest Service, Partnership Resource Center—<http://www.fs.usda.gov/prc>.

The Partnership Resource Center represents an effective collaboration between the Forest Service and the National Forest Foundation. The Partnership Resource Center Web site is a treasure house of information and links about collaboration and partnership training, project funding opportunities, relevant policies and legislation, success stories, and of course, the *Partnership Guide*.

Forest Service, Interface South, Changing Roles Professional Development Program—<http://www.interfacesouth.org/products/changing-roles/>.

The Southern Group of State Foresters led a partnership with the Forest Service's Interface South program; the University of Florida, School of Forest Resources and Conservation; and the U.S. Fish and Wildlife Service to develop a wildland-urban interface (WUI) professional development program. The online resource provides State and Federal natural resource agencies with a set of flexible resources to conduct their own training programs, aimed toward building skills and tools to successfully tackle WUI issues—all relevant to and easily adapted for broader open space conservation issues.

Forest Service, State and Private Forestry, Cooperative Forestry: Forest Legacy Program and Forest Stewardship Program—<http://www.fs.fed.us/spf/coop/programs/>.

The **Forest Legacy Program (FLP)** is a voluntary program in which the Forest Service works in partnership with State forest stewardship coordinators to help communities protect environmentally sensitive forest lands and achieve conservation objectives and other public benefits, including recreation, wildlife habitat, and forest products. FLP funds are used to support conservation easements (65 percent of all FLP projects) and fee-simple purchases (35 percent of all FLP projects) proposed by State agencies. Lands or conservation easements are held by State agencies or another unit of government. Land trusts and other conservation organizations play a critical role by working with landowners, identifying projects, helping to secure cost share, and facilitating the completion of projects. The FLP Web site has a wealth of information for FLP managers and partners, including lists of Federal and State contacts, program guidelines, appraisal information, and links to other federally funded land conservation programs, related conservation organizations, useful maps, and more.

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The **Forest Stewardship Program (FSP)** works through State forestry agencies to provide technical assistance to nonindustrial private forest owners and to encourage and enable active long-term forest management. A primary focus of FSP is the development of comprehensive, multiresource management plans that provide landowners with the information they need to manage their forests for a variety of products and services. The FSP Web site includes *Guiding Principles for Delivery of Coordinated Planning Assistance to Private Forest Landowners* and a *Stewardship Guide*, along with links to guidance for foresters preparing stewardship plans to expedite and facilitate participation in USDA cost-share programs when requested by the forest landowner.

American Planning Association and Clemson University, Conservation Planning Tools Assessment—<https://www.planning.org/partnerships/forestservation/>.

The *Conservation Planning Tools Assessment* (Baldwin et al. 2012) was created in partnership among the American Planning Association (APA), Clemson University, and the Forest Service. The assessment was created to understand (1) APA member planners' use of geographic information systems conservation planning tools and (2) the breadth and scope of currently available tools. Results indicate that because conservation planning tools are complicated and rapidly evolving, most landscape planners do not have the time or resources to use them. A review of 21 conservation planning tools included software, data sources, and key resources (in books, in articles, and online). The tools were categorized under six themes, each of which represents a substantial body of scientific literature and projects. The assessment provides a brief review of each theme and key resources.

The Nature Conservancy, Conservation Partnership Center—<http://www.conservationgateway.org>.

The Nature Conservancy, a nongovernmental, nonprofit conservation organization, offers an interactive, Web-based resource center for conservation practitioners who want to learn how to create and manage more effective partnerships for greater conservation impact. The Conservation Partnership Center site offers partnership tools, methodologies, and resources such as training via six interactive, self-guided lessons and tools and templates for adapting to individual projects, case studies, example documents, references, and a downloadable practitioner's guide.

National Conservation Easement Database—<http://www.conservationeasement.us/>.

The U.S. Endowment for Forestry and Communities has created an online resource with detailed information on the nearly 18 million acres that are now protected by more than 80,000 conservation easements across the United States. Users can search for individual properties or view a State report for a quick summary. Map-savvy practitioners can choose to download geographic datasets for advanced analysis. The wealth of data available via a single, up-to-date, sustainable nationwide system can help identify those who have conserved nearby lands, reveal critical lands not yet protected, and present new opportunities for collaboration and effective partnering. The database was created in partnership with the Forest Service, the U.S. Fish and Wildlife Service, and the Natural Resources Conservation Service.

National Park Service, Rivers, Trails, and Conservation Assistance Program—http://www.nps.gov/nrcr/programs/rtca/whoware/wwa_who_we_are2.htm.

The National Park Service's Rivers, Trails, and Conservation Assistance (RTCA) program is a national network of 70 conservation and recreation-planning professionals. Although the network is nationwide, the action is local; the program leverages expertise and experience to help communities set conservation priorities and achieve open space goals. Project partners may be nonprofit organizations, community groups, tribes or tribal governments, and local/State/Federal government agencies. RTCA does not provide funding but rather supplies a staff person with experience in community-based outdoor recreation and conservation to work with partners. Decisionmaking remains in the hands of community residents.

The Conservation Fund, Green Infrastructure—<http://www.greeninfrastructure.net>.

Green infrastructure typically means highways, energy sources, and buildings, all of which typically are part of local development activity. Green infrastructure also means planning for networks of open spaces and natural resources that connect communities and regions. The Conservation Fund provides green infrastructure expertise to local planning efforts across the country, including training and planning workshops and help with designing mitigative solutions to development dilemmas, as well as help with developing comprehensive open space plans and fundraising guidance.

Federal Highway Administration, Environmental Review Toolkit and Guidebook—<http://www.environment.fhwa.dot.gov/index.asp>.

The Federal Highway Administration (FHWA) Environmental Review Toolkit is a one-stop resource for information and updates about transportation and environment. The toolkit provides up-to-date information on transportation and environmental policy, best practices, and training. Included in the toolkit is a section on Planning and Environmental Linkages, which explores a collaborative and integrated approach to the transportation planning process. An environmental guidebook called *Eco-Logical: An Ecosystem Approach to Developing Infrastructure Projects* offers up-to-date information on a variety of environmental and planning topics, including resources related to interagency coordination and project development. Although focused specifically on transportation planning from the FHWA standpoint, the resources, publications, and information here could easily be adapted and adopted by Forest Service employees wishing to assist communities with development-related transportation planning efforts.



<http://www.thinkstockphotos.com>

Appendix



CHECKLISTS

Checklist 1. Working With Local Governments and Organizations

This checklist can help you determine your local government and planning structures and give you a way to identify and keep in touch with the people who are in local leadership positions. Tailor the checklist to meet your specific needs: Add a column to keep track of meetings, for example, or a column for notes about key decision dates or things to do.

What is the local government structure?	<input type="checkbox"/> Mayoral <input type="checkbox"/> Mayoral-Council <input type="checkbox"/> Council-Manager <input type="checkbox"/> Commission <input type="checkbox"/> Other
Who are the key members of the local government and what is their contact information (name, email, phone, etc.)?	<input type="checkbox"/> Mayor <input type="checkbox"/> Council Members <input type="checkbox"/> Commissioners <input type="checkbox"/> Other
Which office is responsible for zoning, planning, development, and other land use decisions in/for your community?	<input type="checkbox"/> State <input type="checkbox"/> County <input type="checkbox"/> Municipal
Who are the local planners (individuals) and what is their contact information?	<hr/> <hr/> <hr/>
Who actually makes local land use decisions (individuals)?	<hr/> <hr/> <hr/>
What are the active community and neighborhood civic groups (by name) and who leads them (individuals)?	<hr/> <hr/> <hr/>
Does a local environmental advisory board, watershed council, or other land/water/natural resource conservation group exist? If so, who is the contact (individual)?	<input type="checkbox"/> yes <input type="checkbox"/> no <hr/>
Who are the key members of the local media outlets (individuals)?	<input type="checkbox"/> Television station contacts <input type="checkbox"/> Radio contacts <input type="checkbox"/> Newspaper contacts <input type="checkbox"/> Local Chamber of Commerce <input type="checkbox"/> Social media (bloggers, Facebook, Twitter)
Who should receive NFS planning updates?	<input type="checkbox"/> Community groups <input type="checkbox"/> Key members of local government <input type="checkbox"/> Local media and social media contacts <input type="checkbox"/> Other

NFS = National Forest System. Adapted from ICMA and NACo (2006); and updated (2012) edition of this publication is available at http://www.repi.mil/Documents/Primers/Primer_LocalGovernments.pdf.

Checklist 2. Let's Make It Happen: More Ideas for Action

If online resources and earnest efforts still leave you with strained relationships with community planning players, try a few more active approaches, such as—

- Sponsor a facilitated workshop for both Forest Service and non-Forest Service local planners and decisionmakers to explore local planning processes and procedures.
- Bring in a trainer to teach partnership and collaboration skills to both Forest Service employees and key partners.
- Spearhead a community festival to celebrate cultural or environmental resources.
- Ask your public affairs officer or line officer to write regular letters to the editor of local newspapers about open space and natural resource issues; establish a clear, informative, and positive voice before a contentious issue even arises.
- Send staff members to the National Lands Training; this Bureau of Land Management/Forest Service annual workshop covers public land laws and policies, legal public land issues, and tools for making land use and planning decisions and solving potential issues.
- Do some role playing. Develop an approach for engaging with the community, assign responsibilities and roles, and try it out in-house or with trusted colleagues and partners before going *live* in public. Practice!
- Create a mentorship process whereby new Forest Service employees meet or accompany other employees to facilitate participation in local and regional planning and to develop trust with local planners.
- Create a basic toolbox of available tools (such as geographic information systems technology) that you can share with local planners; be ready to grab the tool(s) and go, and be able to explain what the tool(s) can or cannot do.
- Create (and maintain) a database of local planning efforts, including contacts for State, local, and county planning groups, and a schedule of ongoing meetings to facilitate participation in open space meetings.

Add your own ideas. These suggestions came primarily from respondents to the Forest Service Participation in Local Community Planning Efforts survey (http://www.fs.fed.us/openspace/national_strategy/). When you come up with something that works (or not), please share your thoughts at the Forest Service Open Space Web site, <http://www.fs.fed.us/openspace/>, or send an email to openspace@fs.fed.us.

Appendix **B** SCENARIOS: DISCUSSION GUIDE

The scenarios used to introduce chapters 2 through 4 help describe possible situations Forest Service employees might encounter when considering participation in community activities or when working with partners. Although fictional, the scenarios are intended to provide a hint of reality for the topics discussed generally in each chapter.

We hope the scenarios will serve as a launching pad for further discussion—whether formally at staff meetings or informally around the water cooler or in the field. Some possible responses to the hypothetical questions posed at the end of each scenario are suggested here to start you off.

Consider tweaking the scenarios to more closely match real situations in your own experience and explore additional solutions and questions. Build new scenarios to test your knowledge and understanding of the concepts presented in this booklet and to lead you further in your journey toward effective engagement with community planning efforts in the interest of open space conservation.

These scenarios are intended only as a teaching tool to introduce you to broad concepts. Please contact your ethics official or legal counsel if you have questions or need advice concerning a specific situation.

Chapter 2

Scenario summary

Planning Staff Officer Jane Clarification believed she could not provide information to or participate in any way in a local development proposal—although she could foresee potential impacts on wildlife inhabiting the national forest, and she had information that could help mitigate those impacts. Was Jane Clarification really stuck?

Discussion

Jane Clarification’s situation isn’t that sticky. Clarification could attend this public meeting as a Forest Service employee to exchange information, find out more specifics about the proposal, share reports and maps, present her professional concerns regarding impacts to national forest resources, and even offer suggestions for revising the project design to remove or mitigate the impacts that might have consequences for the national forest. Even if she cannot personally attend the meeting, she certainly can notify local or State officials that she has information that could be useful and ask to be kept on the project mailing list.

Most Forest Service maps and data are public information; often planners and the public are unaware of the availability of such information, or they may be unable to interpret it and apply it to their particular project or proposal. Clarification’s official participation likely would be

welcomed or even expected, not only as a source of information and guidance but also as a reaffirmation that our agency is interested in and cares about the community’s issues. Her early participation now, during the design stage, could help the community achieve its low-income housing goal while protecting its public lands and resources.

Because Clarification lives in the area, she probably could also participate in the public meeting unofficially as a private citizen who happens to be a stakeholder or to have an interest in this particular project. The fact that her employment with the Forest Service is well known suggests that, at the least, she would have to state openly that her opinions are her own and not those of the agency. Depending on the exact situation, Jane Clarification might need to consult her local ethics advisor to help define the parameters under which she could participate.

Chapter 3

Scenario summary

District Ranger Joe Curious was dismayed that a new development underway might adversely affect national forest wildlife habitat and water quality and could increase fire risk to the community. Where and how could Joe Curious and his staff have contributed to the planning discussions? Is there anything they can do now?

Discussion

Joe Curious's first opportunity to engage had come early on when he received a preplanning information request from the county. He might have responded, even if just to say he was busy but wanted to be kept informed. This communication could have demonstrated his interest and would have provided the opportunity to monitor the progress of the proposal throughout the various planning and review phases.

If Curious had continued to be swamped, he might have assigned his hydrologist, biologist, or fire management staff to attend a meeting or two, exchange information, and evaluate whether more detailed participation might be warranted depending on the scope and scale of the project and the risk to national forest resources. They might have been able to provide reports, maps, or data that could have been useful during technical reviews. A few hours of their time might have been set aside from some other task to allow attendance at

public meetings to explain the agency's concerns about potential impacts on National Forest System lands.

Now that shovels are about to hit the dirt, it's not too late to participate. Curious and his staff could still contact the developers and planners to offer advice about on-the-ground design and construction. Maybe the exact location of the buildings could still be tweaked to cluster the development and leave more intact forested areas for wildlife, or fences or underpasses might be installed to enable wildlife to migrate safely around the development. Perhaps impacts to the riparian area could be mitigated by relocating the road a bit or by applying other mitigating practices and techniques. Firewise practices for landscaping and building materials could still be put into place. Curious might offer a Firewise Communities workshop to help work out details—and provide it again when homeowners and businesses inhabit the new spaces.

Chapter 4

Scenario summary

Lands Specialist Sally Cautious and Recreation Staff Officer Sam Careful are frustrated and defensive because their brief participation in a planning meeting does not seem to be well received, even though they provided technical reports and warned that impacts on public resources could occur. How could Sally Cautious, Sam Careful, and their forest supervisor have improved their involvement?

Discussion

Sally Cautious, Sam Careful, and their forest supervisor had many ways to improve their involvement. First, they could have brought summaries instead of large technical reports, or they could have simply given some highlights to help nontechnical folks understand and digest the key points. Second, Cautious, Careful, or the forest supervisor could have become involved earlier in the process to get to know some of the people and build relationships that could have laid a foundation for more effective and less emotional dialogue.

When Cautious and Careful tried to express their concerns, they could have avoided the acronyms and simply explained the potential impacts on the protected fish and why increased access to the national forest via the new trail could be a problem. They could have offered ways to help avoid or mitigate the potential impacts on National Forest System land, such as locating the trail head elsewhere or connecting not to the national grassland but to

another existing county trail system—helping create a win-win situation instead of confrontation.

Cautious and Careful had received mixed messages from their supervisor: They were asked to participate but were not given adequate time or resources to follow through. A project with such potential to thwart agency management efforts to protect an endangered species on the national grassland might have given the forest supervisor sufficient justification to reassign Cautious, Careful, or someone else to devote at least a portion of their time to monitor and participate in the process on a regular and meaningful basis.

If the project goes forward, it appears that Forest Service employees could be spending time in the future dealing the implications for recreation, threatened and endangered species, fire access, and law enforcement on the national grassland. An earlier step into the process perhaps could have lightened the future workload and saved money in the long run.



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It does take time, effort, and coordination to respond [to local planning issues]. Frequently, more than we may like. However, it gets easier each time as experience grows, mutual understanding and respect is gained, and working relationships and networks are created or improved.

—Gary Earner
Retired USDA Forest Service employee

Open Space Benefits

- Clean air and water.
- Water supplies.
- Natural flood control.
- Food.
- Timber, forage, and other products.
- Wildlife habitat and corridors.
- Endangered species recovery.
- Climate regulation.
- Scenic beauty.
- Recreation opportunities and access.
- Improved human health.
- Opportunities to connect youth with nature.
- Increased property values.

—*Forest Service Open Space Conservation Strategy*

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