

**MEETING OF THE STAKEHOLDER FORUM
FOR THE NANTAHALA AND PISGAH PLAN REVISION
MEETING RECORD**

**RESPECTFULLY SUBMITTED BY:
MARY LOU ADDOR & MARK SHELLEY WITH ASSISTANCE FROM JON HALLEMEIER**

Thursday, August 17, 2017 11:00 a.m. to 5:00 p.m.
Lake Logan Episcopal Center
25 Wormy Chestnut Lane, Canton, North Carolina

IN ATTENDANCE:

Stakeholders Forum Members: Andrea Leslie, NC Wildlife Resources Commission; Ryan Jacobs, NC Wildlife Resources Commission; Ben Prater, Defenders of Wildlife; Bill Kane, North Carolina Wildlife Federation; David Whitmire, Fish and Wildlife Conservation Council/Headwaters Outfitters; Deirdre Lightsey, Back Country Horseman of NC; Greg Yates, NC Forest Service; Hugh Irwin, The Wilderness Society; JD Diefenbach, Sierra Club; Jim Gray, Ruffed Grouse Society; Jim Sitts, Columbia Forest Products; Bob Gale, Mountain True; Julie White, International Mountain Bicycling Association/Southern Off-Road Bicycling Association; Kevin Colburn, American Whitewater; Lang Hornthal, Root Cause; Megan Sutton, The Nature Conservancy; Rob Elliot, Evergreen Packaging, Ruth Hartzler, Carolina Mountain Club; Sam Evans, Southern Environmental Law Center; Susan Fletcher, Pisgah Hardwoods

USDA Forest Service Staff: Michelle Aldridge, Sheryl Bryan, Alice Cohen, Eric Crews, Larry Hayden, Gary Kauffman, Heather Luczak, Allen Nicholas, Jason Rodrigue, Katie Greenberg, & Paul Arndt

Alternates and Observers: Jill Gottesman, Jon Hallemeier

National Forest Foundation Facilitators: Mary Lou (Lou) Addor & Mark Shelley

11:00am GENERAL WELCOME AND GREETINGS COMMENCED

11:00 a.m. LUNCH PROVIDED and REVIEW OF SMALL GROUP GA PROPOSALS
Lunch was provided. Stations with the Geographic Area (GA) maps and proposals developed by Forum members who attended the July and August small groups meetings were made available for everyone's review.

11:45am OPENING THOUGHTS BY FOREST SUPERVISOR ALLEN NICHOLAS
Allen Nicholas, the NFsNC Forest Supervisor, opened the meeting welcoming everyone and expressing his appreciation for the diligence, thoughtfulness, and the good work of Forum members, his staff, and the National Forest Foundation staff. In particular, he acknowledged the Stakeholders Forum, and the number of diverse interests represented on the Forum. He asked everyone to have patience with themselves and each other, and as best as possible, search for common ground where appropriate.

12:00pm ANNOUNCEMENTS AND AGENDA REVIEW

Lou identified agenda items for those in attendance. First up was Rob who provided a proposal on how the Forum could tackle recent negative media reports followed with a status report on the county outreach efforts.

Several Forum members, including Rob, met earlier that morning to discuss the challenges that recent media articles had created personally/professionally for several members and for the Forum in general. This coverage has put outreach efforts in a difficult position as counties wonder where to dedicate their resources and forest plan efforts. During the morning's meeting, those in attendance, discussed the impacts of the press on the Forum, determined ways to heal aspects of the damage that had resulted, and to consider proactive steps forward that would demonstrate to communities at large that the Forum is focused on a productive efforts and as best as possible, collaborative outcomes. The immediate goal is to draft a media release about the progress of the Forum which will begin to rebuild public trust. And second, heal the bonds of trust within the Forum.

With respect to county outreach efforts, Rob reported that 18 counties have been contacted. Rob welcomed representatives of these counties to join the Stakeholders Forum meetings and offered to have a Stakeholders Forum delegation present to them. The Forum County Outreach group has proposed to present to the counties within the Pisgah NF and the Nantahala NF, at a central meeting location for each forest. The purpose of the meeting would be to learn from counties about their various interests in the Forest Plan in addition to having them understand the diverse perspectives represented in the Forum. The County Outreach Group received a response of interest from several counties, but has not scheduled a meeting. Members of the Forum seemed willing to contribute to the idea once dates, times, location, and responsibilities were firmed up.

Lou reviewed the purpose of today's agenda, the focus of which is primarily informational as described by the following objectives. Time for clarifying questions will follow the presentations.

MEETING OBJECTIVES

- Forest Service shares with the Stakeholders Forum the rationale behind the latest thinking, the analyses and evaluation tools
- Discuss the meaning of ecological restoration and strategies/tools to achieve it
- Provide an opportunity to the Stakeholders Forum to ask clarifying questions about key topics and be able to apply that information in proposal development

Lou reviewed the **Proposal Development Document** (located in Appendix A, p.) and introduced by the National Forest Foundation on Aug 16, 2017 that included steps being presented for proposal development, a process by which to share proposals and who could share proposals, and the decision criteria by which proposals would be selected. Two important dates for your calendars:

- September 1 – due date to submit collaborative proposals/trial balloons to the NFF
- September 5 – NFF will circulate package of proposals to all SF members for review

Questions raised about the proposal development document included:

1. If we are managing a document through Google docs, how will you accommodate those that are not as familiar with or may have some difficulties participating with this method? *Check with peer if you are sure how to use Google docs. NFF will provide instructions on working with docs as we need it to edit and provide input to participate. The documents will use track changes and any changes and actions are made visible on the Google menu bar.*

2. What is the scale of proposals – GA? site specific? *The proposals are requested to be mutually beneficially and inclusive such that scale should be specific to the topic or as comprehensive as GA, if that is range of the topic.*
3. What about issues/proposals that are less controversial? *Proposals that are mutually beneficially and inclusive are still on track even if they are less controversial or have limited controversy.*
4. What about consensus for the proposals? *NFF is not looking for looking for 100% agreement on the proposals. There will be gradients of agreement as expressed in the 3-finger model used by the Forum. It uses 3 levels of support: thumbs down=cannot support the recommendation, decision, or proposal at all and here's why and here's what I proposed; thumbs sideways=can live with the recommendation, decision, or proposal (though have some reservation(s)); and thumbs up=fully support the recommendation, decision, or proposal: each level can be qualified. If a thumb down is presented, that person puts forth a new option. Note, the code of conduct still requires no harm even if someone chooses to put forward a thumb down. The proposals will be a mix; parts that people fully support, parts they can live with, and parts that they cannot support at all.*
5. Do state agencies plan to fully weigh in on these proposals, or are there limitations? *In proposal development, state agencies will part in development where they can and where there is concern as professionals, check with their respective agencies. Regarding weighing in with level of support on proposals, Forums members will check with his/her respective agency or provide a policy statement.*
6. Beyond the agreement of the Forum, moving into implementation stage, how does the group continue to work together to implement these recommendations and the Plan? *Charter of the Forum is confined to the Planning Process. Let's move this discussion point to the Organizing Committee to work through as this question has been raised before and thus seems to be important to the Forum to tackle for long-term accountability to the process established.*
7. A suggestion was put forth to formally agree to review all proposals regardless of who developed them: example if the Recreation Group submitted a proposal. *USFS asked to table this process and reserve it for discussion in the upcoming Organizing Committee meeting as there was concern that the presenters would not be able to cover their scheduled presentations. Since the SF will not have time to consider individual, single-group or single-interest proposals, broad-based, mutually inclusive, and beneficially based proposal should be considered by everyone including the Partnership, the FWCC, and others as described in the Proposal Development Document.*
8. What is the Organizing Committee's responsibilities and timeframe with respect to the proposal development process? *The NFF will arrange a call soon to discuss this process in more detail.*

Lou presented the agenda for the speakers for remainder of the day:

SETTING THE STAGE (Context): Ecological Desired Conditions in Action (Jason Rodrigue)

ASSESSMENT: How it is used to build our latest thinking

- Natural Range of Variation, Departure, Patch Analysis (Gary Kauffman)
- Gap Analysis (Sheryl Bryan)
- Putting the Pieces together (example scenario) (Jason Rodrigue)

RESTORATION PANEL (Larry Hayden, Gary Kauffman, Sheryl Bryan, Jason Rodrigue)

- What it means in the planning rule

- What it means to each of the specialists, including a reference to multiple objectives for timber projects

CURRENT THINKING ON ACTIVE MANAGEMENT (including references to suitability) in the Plan

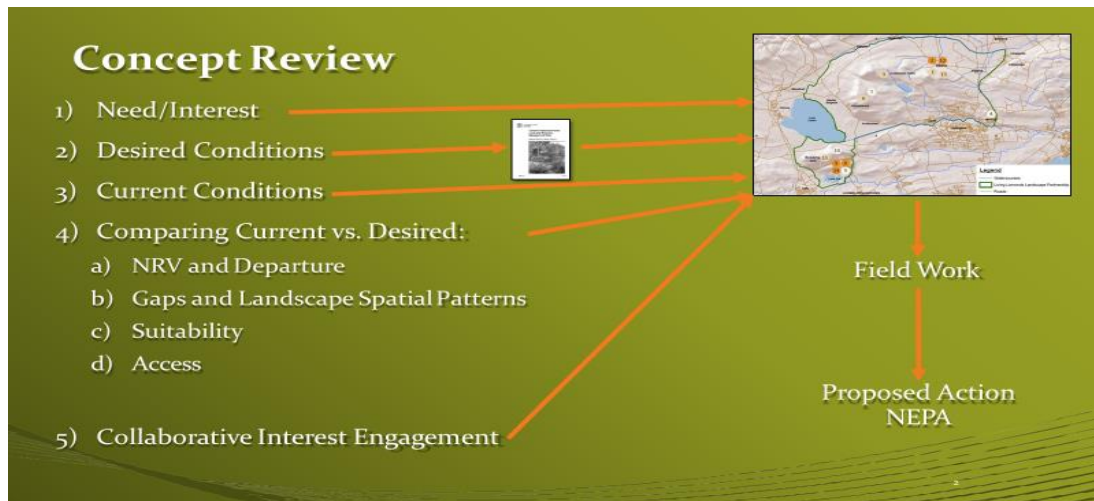
- Recap of Table of Treatments (Jason Rodrigue)
- How the table is used (Sheryl Bryan)
- Suitability (Paul Arndt)

SMALL GROUP DISCUSSION ON SUITABILITY

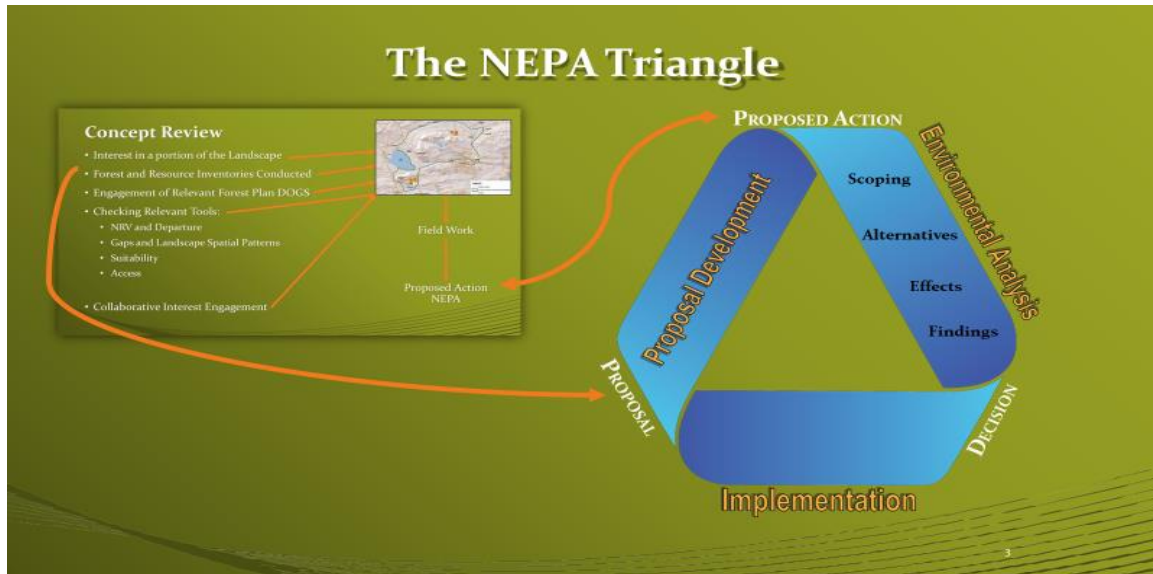
SETTING THE STAGE (Context): Ecological Desired Conditions in Action (Jason Rodrigue)

Jason’s presentation was designed to SET to the STAGE for the day’s informational meeting. His goal was to set the context and introduce concepts with the help of his team about a forest plan to a hypothetical district project work. Jason would also introduce the relevant tools a team uses to compare current vs desired conditions. For a project to occur, there’s a 1) need or an interest internal to Forest Service, or external to a community. For a project to go forward it is measured against 2) DOGS (desired conditions). Then an analysis is conducted of the 3) current conditions using an 4) investment of tools to compare the current and desired conditions that will help determine the future direction of the project. Relevant tools, that involve tremendous field work, are considered:

- a) NRV and Departure
 - b) Gaps and Landscape Spatial Patterns
 - c) Suitability
 - d) Access
5. Collaborative Interest Engagement



Collaborative interest and engagement is woven throughout the process to ensure others with an interest are invested with the projects. In addition to the collaborative effort, to the NEPA Triangle begins with the proposal, through proposal development, the proposed action into Environmental Analysis, then Decision, and Implementation.



Jason introduced a hypothetical district project of a golden-winged warbler focal area

More Specific (but hypothetical) Example

- 1) Interest/Need in a portion of the landscape
 - A golden-winged warbler focal area
 - Restoration of departed conditions (structural and compositional)
 - Area was managed in the past but hasn't in the last 25 years




conservationbio.org

There is an interest and need, compared to the relevant Forest Plan DOGS, the goals and opportunities of the GA, and Matrix DOGS. Analysis of the current condition included inventory plots contracted, NNIS surveys, bat and bird surveys, recreational and management infrastructure assessments (roads, trails, camping). NRV and departure and ecozones was used with Forest Service vegetative growth. In addition, other input/factors may be considered, by organizations such as NC WRC and Mountain True and TWS. Other tools like lidar, scenery inventory, imagery, stream riparian, rare and sensitive species were employed.

More Specific (but hypothetical) Example cont.

2) Relevant Forest Plan DOGS:

- a) Nantahala and Pisgah = Forest Wide D.Cs., Objectives, Guidelines, Standards,
- b) Geographic Area = Goals & Opportunities
- c) Management Area(s) = MA D.Cs., Objectives, Guidelines, Standards

FW:
 DC: Shrubby/YF present across all ecozones
 DC: Regen maximize wildlife habitat, C+S Diversity, resiliency
 OBJ: Old Growth conditions
 OBJ: YF > 2,500 feet, GWWA
 OBJ: Open/Woodland
 G: Minimize hybridization w/
 S: Limitation on EAM opening size except for restoration of offsite WP.

GAs:
 G: Restore high elevation open habitats for GWWA, Elk, RGS where lands are adjacent to TN.
 G: Reduce off-site species to increase resiliency to climate change.
 G: GA Departure Analysis
 G: Partner with NCWRC to enhance and restore GWWA habitat.

MA Matrix:
 DC: Young forest, higher freq., Size may exceed natural disturbance.
 DC: Inc game spp, support rare/unique
 OBJ: ER (SP, DMO, POH, WP, TP)
 OBJ: YF 650 to 1,200 Annual
 S: Harvest to restore/maintain (NRV)
 MA Backcountry:
 DC: Mid-Late Succession, smaller gaps
 DC: Habitat supports rare & unique.
 S: Remove to restore comp & structure.

Terrestrial findings/summary.

- Deficient in young (less than 80-years old)
- Deficient in mature (over 100-year-old)
- Species trends – related to forest type/age: Birds id to late are doing ok. Early seral birds, some in decline.

According to Jason, the primary purpose of the districts has changed. The NP districts have seen the largest disturbances such as reduction in wildfires, decimation of the chestnut tree and passenger pigeon. First job of the districts was to shore up the impacts, help recover for the future but the great world wars came, and jobs changed. The forests supported a rise of global power. Restoration of forested conditions was still very important as economies were rebuilt and Congress requested raw materials. A rise of the eco-movement served as a check-n-balance for both demand and extraction technique. Each effort all the way became part of what is known as the current forest plan; heralded as one of the most environmental sensitive in existence. The forest plan still contained provisions for order of entry or timber sale projects, language which makes a silviculturalist wince as timber sale projects are much more than that and these projects become harder within these budget times. The current effort is trying to breathe new life into forest planning process to create, restore, and ensure multiple use.

Setting the Stage Questions:

1. What generates a project? *Ranger can coordinate or identify the need, or a project can be initiated by a group or individual.*
2. How does the Forest prioritize order of entry? Harder to do order of entry work in last 10 years because of funding. *Ranger is more comfortable with multiple reasons to go there. And once project area is defined by district ranger, the plan is the guiding principle, need to know that project will move towards DC and objectives give sidebars.*
3. There are other needs (in addition to ecozone and silvicultural needs) e.g. trail needs, hemlock treatment (timing) – that are often deferred. How to incorporate a broader assemblage of needs in the development of a project? *This question was address in part: it's up to a ranger to figure it out. But think about big project, like silviculture and wrap up other things into it. Apply other resource needs.*

ASSESSMENT INTEGRATION: How It IS Used to Build Our Latest Thinking **Presenting how the Forest Service integrated assessment into their latest thinking from** **Three Perspectives (Kauffman, Bryan, & Rodrigue)**

- Natural Range of Variation, Departure, Patch Analysis (Gary Kauffman)
- Gap Analysis: providing a definition of a gap, the process for identifying and an overview of the analysis across the Nantahala NF (Sheryl Bryan)
- Putting the Pieces together (example scenario) (Jason Rodrigue)

Nantahala Pisgah NF Plan Process - Natural Range of Variation, Departure, Patch Analysis (Gary Kauffman)

Gary Kauffman introduced one of the relevant tools able to assess current conditions – natural range of variation (NRV). Gary mentioned the presentation would be NRV light such that anyone who would like additional information can follow up directly with Gary.

With respect to NRV, plan directives indicate it must contain plan components, including standards or guidelines, that maintain or restore composition, structure, ecological processes, and connectivity of plan area ecosystems in a manner that promotes their ecological integrity. When developing plan components, the Interdisciplinary Team shall consider the role of the natural range of variation. Each Ecozone has a Natural Range of Variability that is described by:

- Composition (veg. type)
- Structure (Open vs. Closed)
- Disturbance (Age- Early, Mid, Late, Old).

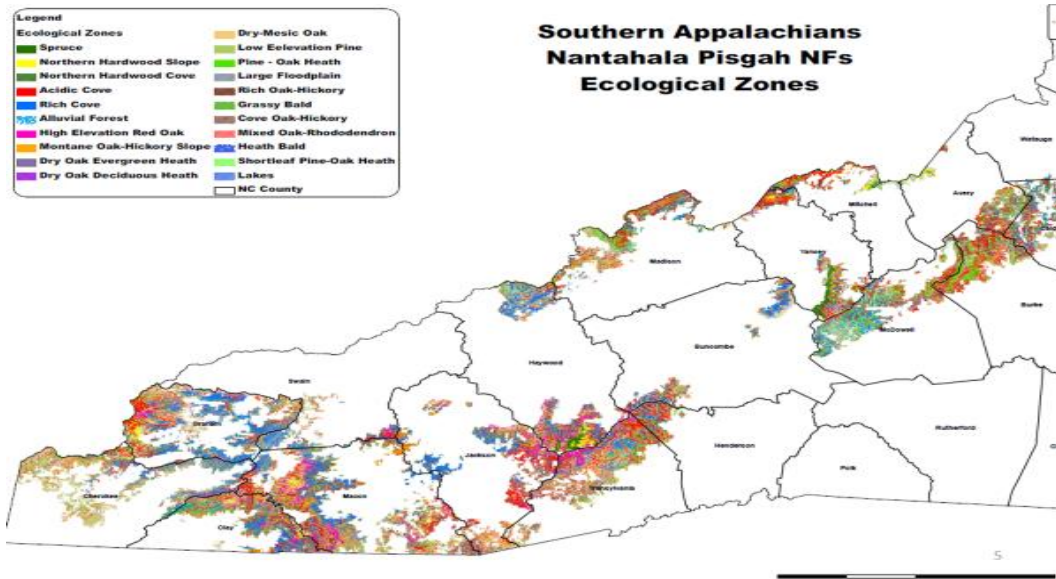
Defining Natural Range of Variation:

- Determine appropriate ecozones
- Correlate Landfire biophysical setting (BPS) modeled vegetation units with ecozones
- Review other local Landfire modeling examples in Southern Apps
- Develop age and successional classes for Nantahala/Pisgah
- Determine appropriate disturbance regimes (type and frequency) for each separate BPS
- Run state and transition simulation models (STSMs) for each separate BPS; incorporate variability for all disturbance regimes
- Define a geographic area for BPS models

Environmental Modeling

- Uses digital terrain data (elevation, aspect, slope, etc.) to approximate environmental gradients (moisture, temperature, fertility) to define types of environment
- Uses Plant Associations (Dry Oak, Rich Cove, Spruce-Fir, etc.) to name the types of environment
- Determines relationships between Plant Associations and digital terrain data at known locations and extrapolates to unknown locations: Model = a mathematical approximation of reality

Modeling helped determine Ecozones. Ecozones is a modeling process that was done by former employee Steve Simone. On NP and surround landscape, digital terrain data to approximate environmental gradients (moisture, temperature, and fertility), define types of environment.



Determination of Final Ecozones by combining various model zones; merged types with similar plant diversity

EcoZones ¹	Nant-Pisgah Acres	Nant-Pisgah Percent	Changes
Spruce-Fir	16600	2%	
Northern Hardwood	53920	5%	includes slope and cove types
High Elevation Red Oak	38640	4%	
Acidic Cove Forest	240940	23%	combine acidic cove and mixed oak rhododendron types
Rich Cove Forest	189140	18%	
Mesic Oak	186200	18%	includes slope, cove and rich types
Dry Mesic Oak	105990	10%	
Dry Oak	59680	6%	includes evergreen and deciduous types
Pine-Oak Heath	101280	10%	
Shortleaf Pine-Oak heath	44450	4%	Combine low elevation mixed pine-oak and pine types
Floodplain	2640	0.3%	combine alluvial and large floodplain types

¹ Third Approximation Southern App Model

Plant Communities in Southern Appalachian Landscape



Landfire is a nation-wide database that in part describes vegetation dynamics, including structure and disturbance regimes, for 1000 plus ecosystems, known as Biophysical Settings (BpS). The Biophysical Settings (BpS) represents vegetation that may have been dominant in former times with less human intervention. Map units are defined by Nature Serve (Nature Serve.org) Ecological Systems, a nationally consistent set of mid-scale ecological units.

Examined frequency of disturbance types for each BpS model for each s-Class. Data was incorporated from literature, previous determinations, and discussion with experts. Included Disturbance Frequency for following major types.

- Fire - Surface, mixed, and sever
- Wind including hurricanes and downbursts
- Hoar Frost-Ice
- Severe Rain Events including Flooding
- Diseases
- Insect Outbreaks

Aspects of Modeling

- Developed models with state and transition simulation software
- Each model ran for 1000 years with 100 simulations
- All models were non-spatial
- Model results for broader spatial scale
- Models do not provide compositional distribution
- Structural diversity does not define gap size, rather defines open habitat as less than 60 % canopy cover
- Results with greater open forest (young and woodlands) in drier ecozones compared to moist ecozones
- High elevation models more open based on more frequent storm impacts

The Planning directives states if past conditions relative to the natural range of variation are not appropriate, practical, possible, or desirable approaches, then the ID Team should design plan components based on a general scientific and ecological understanding of the conditions that would sustain key ecosystem characteristics and sustain at-risk species using factors such as:

- representativeness,
- redundancy,
- observed conditions in reference
- habitat associations of particular species, and
- disturbance dynamics,

NRV can provide perspective from historical conditions

- NRV provides an understanding of processes that drive ecosystem change
- Models make logical sense compared to each other, varies by ecozone
- Landscape Patch A does provide for larger patches where a mosaic of natural disturbance can occur
- Landscape Patch A does provide representation in ecozones
- Landscape Patch A does incorporate species and unique habitat diversity

Estimated departure equals desired condition minus existing condition.

NRV Questions:

1. How did you arrive at numbers for size and frequency of models? *Look at previous models. Best data was with fire in drier habitats. Otherwise considered the literature. There is a paucity of information and thus tried for range. Anything with the modeling, that would be the most suspect. With NRV, if you look at this planning cycle, might be better for next cycle in next 15, 20 years, maybe 30.*
2. Effects of losing elk and buffalo in our area, how did those play in the modeling? *Did not incorporate elk nor megafauna and not sure how to incorporate it. Looking at some of the oak habitats, and perhaps being more open. A lot of these models are more open than others.*
3. Chestnut? Worked with Blankenship who has done modeling. *It did not produce any change, which is why we simplified.*
4. Native Americans and disturbances they created? *Did look at fire disturbance, but with data that was more chronological though not necessarily involving Native Americans. Hybrid, not sure sequence of the burning,*
5. Seems like most of the disturbance patterns will be intensified? *Not incorporated into the model perhaps it would intensify likelihood of fire and rain events.*
6. My question is a bit difficult for me to ask so I may fumble with parts of it. Departure assumes static and based on the goals we have set, or are considering, that may not put us on the trajectory to make a big dent on departure values. In terms of implementation, how can the NRV and EcoZone model be used to try to get a decrease in those departure values, considering that those values might not always be static? *The range is partly to keep from being static. Also, consider climate change.*

Say we said, this is the departure and use these goals to recreate. And other changes happen that cause that departure to increase, or decrease on its own? *I think that is all part of adaptive management. Departure has taken a long time, is going to take a long time. Not going to achieve it in one planning cycles, maybe not 5 planning cycles. So if you can redo that departure analysis, might be better data when you do it.*

Nantahala Pisgah NF Plan Process – Gap Analysis-Definition, Identification and Overview of Analysis Across the NF (Sheryl Bryan)

Sheryl asks- what is a gap? There is a plethora of definitions in the literature. For today discussions, it is defined as a break in the forest canopy, created through natural or man-made disturbances that influences the structural diversity and function of the surrounding environment. Function is a matter of scale.

Smaller openings (e.g. single and multiple tree fall gaps):

- Create light pockets and affect local habitat conditions
- Facilitate structural diversity within the surrounding forest

Larger openings (e.g. larger natural and most man-made disturbances):

- Facilitate early successional habitat and young forest conditions to varying degrees, depending on size, location, and vegetative composition
- Edge/open area ratio and vegetative composition are critical to a gap's effectiveness as early successional habitat
- ESH/YF habitat needs vary by species

Two gappy “take-homes”:

- Most (but not all) animal species require more than one habitat condition, and are associated with early successional habitats for at least part of their life history.
- One gap size does not fit all...

Identifying canopy gaps.

1. From LiDAR:

- Identify pixels where: Canopy Cover = 0-25% AND Tree Height = 0-15 feet AND Shrub Density <50%.
- Aggregate function to reduce extreme data patchiness
- Identify gap patches using 8-pixel neighbor grouping (i.e. two pixels touching any side/corner = same patch)

2. Convert raster patches to polygons; intersect with PNV to assign ecozone

3. Give a VERY LARGE shout out to Carly Lewis from the Lolo National Forest and Mark Endries from the USFWS Asheville Field Office for their help on this effort!

- a. One limitation of lidar data, set first level of height, the lidar does not discriminate if grass or pavement etc.

Really aware that we've presented you a lot of modeling. They have strengths and weaknesses, don't use them for what they are not. Know the assumptions of each model.

- Each of the models and data sets used in this analysis has strengths and weaknesses and is based on assumptions. Sometimes “assumption math” does not follow conventional mathematics (i.e. assumptions may be related to each other in ways other than directly cumulative). We need to be in our comfort zone with these assumptions.
- These results are estimates based on the best available data, and should be subject to revision (i.e. post plan revision) as newer/better data becomes available (e.g. 2017 LiDar data). Open to revision with new data. Is the data repeatable? We can check in a couple years and see if we're headed in the right direction.
- There is room for refinement (e.g. include ESHmod and NRVopen?).
- Nothing should take the place of “ground truthing”-of boots on the ground to confirm site-specific project conditions and assessment of project contributions to overall landscape- level conditions.

The overall value of gap analysis is it

- enhances our ability to help restore landscape mosaic, including doing a better job of incorporating all lands.
- highlights our ability to look at effects of natural and anthropogenic disturbances on YF/ESH and other structural conditions
- instills lessons from *Greenburg and Collins to*
 - *Shift in management perspective*
 - *Emulate effects of natural disturbance*
 - *Address long-range environmental challenges*
 - *Keeping it realistic*

Gap Analysis Questions:

1. The lidar data, until its interpreted, doesn't know whether its tree or rhodendron or pavement. So the data being presenting now, is the pavement extracted? *Yes, we have analyzed forested conditions only.*
2. Are food plots incorporated in the gap analysis? *Will need to refer to the notes of the prior FS staff to determine whether she included food plots or not.*
3. Are daylighted roads incorporated into the gap analysis? Same for 2016 wildlife fires? *Even when we get to 2017 lidar, probably not. There may be a way to incorporate some of information anyway.*
4. Tie to departure analysis based on ecozone? *This is the spread of gap size we'd expect as reference condition.*
5. Have you been able to look at different parts of the forest with different managed histories? *Once we agree on distribution on landscape and how identified, we can look at this.*
6. Arson season from last year too. Could change the baseline? *We are aware. That could be exposed in first monitoring of plan. Not sure where we're going to freeze data for analysis. Jim touched on this a few years ago.*
7. Can you display gap size by ecozone? *Yes.*
8. Quality of gaps? *What's coming back is not always desirable/contribution to ESH*

Pause and Reflect With Your Neighbor - Pairs Exercise Followed with Break

How does what you heard advance your thinking on ecological desired conditions and overall direction of the forest plan— jot notes down individually and then turn to the person next to you to share your perspective.

Jason Rodrigue returned to the group to present a proposal that he thinks will lead to things in the direction of the desired conditions. He distributed a silviculture tool box handout. He has proposed action following proposal completion that may take months to complete. It will take alot of hard work to complete the 12-mile field work. Jason presented several proposals:

First, non-commercial passive late structural management. Non-commercial treatment, could do things like invasive species work, etc. we're allowing this to transition towards OG.

Second, commercial group selection and thinning. Same area as MT and TWS saw. But this area has access and GWWA. To increase canopy distance, full crowns.

Third, non/commercial/commercial thinning. Go in to take a look for structural or compositional situations. Able poplar, and get more diversity. Also, responsive to overabundance of mid-closed conditions.

Prescribed burn in backcountry. Good potential for containment lines. Woodland on isolated ridge. Dry mesic oak. Two age/woodland permanent opening complex. Neighboring back country area similar, so propose woodland condition.

Dry oak area in a suitable MA, not a suitable community, as it is sensitive, not great for commercial timber. Rich cove ecozone but dominated by WP. Remove with clear cuts, with hardwood reserves and stimulate return to diverse hardwoods. Current WP in 80 acres for restoration.

How is this different? Same old same old?

- Desired Condition focused project development
- Ecological conditions and habitat are drivers for project development
- Ecozones/NRV/Departure tools playing a larger role in management locations
- Collaboration is woven throughout the process used to develop the project.

DC Proposal Questions:

1. Great project! But what about the plan will get us there?! 12 miles of great and so much work. How can we repeat this effort Forestwide without so much work? *You all are doing similar work, in part because collaboration is woven throughout the process.*
2. Today is the first day I learned that organizations can propose a project. This is a whole new process for me. How do you do it? On an equitable basis? *Stay involved. Work with the district rangers.*

RESTORATION PANEL

(Larry Hayden, Gary Kauffman, Sheryl Bryan, Jason Rodrigue)

The panel of Forest Service Specialists focused on the following two questions while offering four perspectives on the topic of restoration.

- *What does restoration mean in the planning rule?*
- *What restoration mean to each of the specialists, including a reference to multiple objectives for timber projects?*

Larry Hayden led off the Restoration Panel, fondly known as the grandfather of forest planning. Larry provided context by briefly introducing the history of planning rules, starting with the 1982 Planning Rule and, more recently, the introduction of the 2012 Planning Rule.

According to Larry, the early planning rules involve multiple use and constraints such as produce timber with economic efficiencies. In 1990, 1995, 2000, 2005, and 2008, effort was made to update the regs, and failed. Thus in 2009, leadership requested that Larry lead an attempt to update the planning rule. As a team, he and others invested time in reviewing what had occurred with the prior attempts. Their effort revealed that there was less dependence on timber production, and more focus on Landscape Ecology (LE) and conservation bio, given newer tools like lidar, aerial photography, satellite imagery, Google Earth; tools with wider landscape visuals and processing capabilities. The science progressed, and forest plans were incorporating more principles of LE and conservation into the planning process. Part of forest planners job was to update the planning rule and update it to catch up with the future of the agency. The Agency was already there with LE and conservation bio. Timber production was primary in 1982 plans, but drifted into secondary objectives in later plans. A couple of things came out of the 2009 study. One, that the view is on systems rather than timber stands; it's the herbaceous layers, the animals, the biophysical interactions that are happening within a system. Second, scale matters, whether one is talking about a patch, isolated ecozone or stand or talking about patches across the landscape, finer vs broader. Third, most plans were sustainability driven. The way was to ensure eco systems are in as good of shape as possible for resilience; resiliency is the ability to recover from disturbance.

If we could restore and maintain to NRV that means most of the species that we had before widescale human disturbance that were supported by natural systems, would be maintained over time. If you cannot reconstruct NRV, or historic range of variation (since some human disturbance in the assumption). Then there is functional restoration, composition, structure, eco processes function, and connectivity, then species should be maintained. Forests provide filters, we're going to maintain most of the species across the NF land base, a centric approach to species management though also look at species for those in trouble.

Also, multiple use, social sustainability that plays into this too. NRV does not dictate DC, but it is a useful guide. Want to be in range as much as you can.

Jason Rodrigue spoke about restoration using a project-level White Pine (WP) example and the restoration continuum.

- past conditions – past projects/actions/results
 - current conditions
 - proposed actions/expected change
 - opportunities for restoration
- 51 year old 86 acre WP
 - Brushy ridge project
 - Immediate change in YF in three ecozones. Treatment harvested 35,000 dollars of value
 - Ccf of WP sawtimber, can use that value to improve stand and projects in the area.
 - Ecozone model give Short Leaf and Red Oak.
 - Focused short leaf planning on ridge near other Dry mesic oak, took red oak and planted in clusters, going to be a battle to keep WP out. Pockets of red oaks to work with for the future. Beginning compositional change.
 - Had mountain biker come by on road. MB and hunter. This looks great. I know where I'm going this fall. Felt good about it.
 - Did provide wood products, not hardwoods.

Moving from departed to less departed. Not full restoration with this treatment restoration is a long-term investment. One step at a time. Will have to reenter multiple times. Will have to thin stand in future to

create conditions to advance those trees into the future. And will cut stand again to release red oak. If I schedule for another harvest, we could propose flexible. With ages for the rescheduling.

Restoration continuum of conditions. Relationship between DC getting community moving in the right direction. Past made it WP and current condition, and our action moving towards future condition. Silvicultural intent: our vision for the trajectory of a stand is put in place. The ability for one management cycle to move it forward.

For Sheryl Bryan restoration means the terrestrial end of things: wildlife, structural and composition diversity for wildlife etc. Habitats, populations of demand species. Restoration can occur on multiple scales. By and large, wildlife habitat.

For Gary Kauffman, as a plant biologist, restoration occurs on a community level and at the landscape level. Species: rare plants, restoring habitat, reducing woody competition, nonnatives, genetic composition. At the landscape level, within a community, you might want to improve habitat, do some burning. At a community and landscape level. When we're restoring something, multiple entries. Buck creek serpentine barrens, started restoring in 1995, just now restored. Rarest community we have on the forest, for open habitat. Hadn't been burned for 50 years. We had to thin. Cut some hemlocks when everyone was trying to preserve them. Lushes grass/for the community on the forest. Four or 5 entries. Historical range of variation, thinning, but also lots of burning, strategically for long term, not just one entry, preserving what we have there.

Restoration Questions:

1. Based on the current directives, why push to put the bulk of restoration timber production into MAs when there are overlays that have major constraints? [timber production, the rotation continues after the DC is reached]. *Let's table for Paul to address*
2. In terms of restoration, how are you going to incorporate commercial activity within the restoration program, particularly if you have low value timber? What if there are no bids? *Jason offers that with a Stewardship sale, the entity can contract.*

And further, local folks (and the county) want to keep the bidding with locally but if its opened, anyone can bid on it. Can this be done? *This question was not addressed.*

Others offered comments (not questions):

- Whether its commercial or not, that is one aspect of the harvest. That by itself doesn't get at if its restoration or not. Restoration is easy to define. Restoration is the process of assisting the recovery of an ecosystem that has been degraded, damaged, or destroyed. Not all NRM activities need restoration, and not everything we do needs to be restored. We need to be clear.
- If you have restoration management and you need to remove trees, there are limited ways to do that. There is a timber harvest and sending those trees to market somewhere. Only two ways to do that. Stewardship sales and Timber sales. Both of those are commercial. Only way that stewardship and timber sales happen is with bidding. Jason clarified that Stewardship sales can contract.

CURRENT THINKING ON ACTIVE MANAGEMENT IN THE PLAN

(Jason Rodrigue, Sheryl Bryan, & Paul Arndt)

Jason provided a recap of the Table of Treatments. Sheryl presented how the table is used.

Michelle prefaced the Suitability discussion by stating that the intent in handing out the list of treatments was that suitability ended with it, rather than begins with it. Start with DCs DOGS, and this sets you up. Then make sure suitability factors into those DCs. In the plan components for matrix and interface, DOGS say timber production is not primary, but secondary and will be a tool. In the Suitability webinar, a number of questions were posed that Paul is here to address. Michelle stated that timber production will not be the primary purpose for projects or activities, that it is a tool and not a driver.

Paul Arndt, regional planner, set the stage as a follow up to a recent Suitability webinar presented to the Stakeholders Forum. First stage: identified what lands may be suitable for timber production and which are prohibited by Congress or there is no reasonable assurance that the lands can be restocked. Then consider what are the desired conditions and what are we trying to accomplish (criteria, compatibility, e.g. provide wood products, sustained flow, regeneration is scheduled). Ask: Will it return to forested conditions? Some places out west were harvested and there was no regeneration. We want to ensure that if any lands are harvested, that regeneration can occur.

There are some places where re-entry should not be a part of the management unless for restoration (achieving or maintaining desired conditions). They are currently included in the Interface and Matrix - How many acres? These areas need to be identified. Have that discussion - what designation to protect OR expectation that we have to go back in would be eliminated through fine filter / are conditions achieved?

From that, one piece of criteria, which is complicated, is that timber production would not be compatible with other DOGS. Those that are compatible, would be suitable, and those not compatible would be unsuitable. First, is the determination of DCs, Gs, Os, what are you trying to accomplish? Then how do you define compatible. The directives have more wording about what it means to be compatible. Timber production is a primary or secondary use of the land. Timber production is providing wood products, something you want to accomplish. Primary or secondary -that a flow of timber can be planned and scheduled. Next one, regeneration of the stand is intended. If it meets those criteria, that it will provide timber, and is scheduled, then suitable.

Suitability vs. Unsuitable

Where do you draw line between suited and unsuited? The whole distinction between suitable and unsuitable has been blurred and is less critical than it has been in the past, because the way we used suitability in 1982 Rule vs 2012 Rule. In 1982, we had long term sustained yield based on the suitable acres. In 2012, we have Projected Timber Sale Quantity based on what we think will come off of both suitable and unsuitable lands. We also have a Sustained Yield Limit that is based on all lands that "may be suitable" which makes the 2012 distinction between suitability and unsuitable a bit more blurred. When we make a determination if an area is suited or unsuited, we look at the DCs, then look at planned schedule, which gets to silvicultural activities that need to occur to create and achieve those desired conditions.

Planned: we can have planned activities on both suited and unsuited. You can have a planned activity on unsuited.

- Scheduled: series of entries through the planning horizon/normally including a regeneration harvest. Because its scheduled doesn't mean that it's a timber crop plantation. We don't have to

harvest at the culmination of the mean annual increment, we can look at any time after that. A “schedule” just means a planned level of reentry.

- Regeneration Harvest – silvicultural activity to create early succession. Regeneration harvest is any time we plan to go in and have a silvicultural activity to create a young age class. If we intentionally do a harvesting action to create a young age class, then that is a regeneration cut. That can be any kind of silvicultural action. Could be CC, group, single tree, etc. can all be regeneration cuts.

Timber production, harvest, goal, tool

Timber production can be defined as an approach to managing timber growth/ generating fiber. Timber harvest is a tool. Can have timber production as a goal. We want to produce this much board feet, we can feel like that's important and try to reach that goal. In terms of a tool, that goes back to discussion we had, if we are using timber harvesting activity to create DC, the best way to do that is a timber sale, and have timber products. That is what we mean as timber production as a tool, providing timber products as a result of our management actions.

Timber production can be

- a goal - i.e. forestwide we want ## acres
- a tool - using harvesting activity to create desired conditions (through a timber sale)

If an MA is suited, those lands could have treatments activities that would meet the criteria of suitability. All kinds of other factors come into play in choosing what to do.

Confusion over 1982 Rule vs 2012 Rule. In 1982, identification of suitable acres, were those that were identified through a timber scheduling model, and in that model, had scheduled a harvest for those acres. Just those acres were identified as suited. Under 2012, suitability is identified by DC, and a schedule of silvicultural activities and series of actions would be needed to achieve that DC. [Note critical point here: difference between 1982 and 2012 is that in 2012, the acres that are identified as “compatible” with timber production are identified as suitable, but not all of these acres may necessarily be “scheduled” to be harvested over the planning horizon,

Concerns expressed included about suitability and the placement of NAPS and WHAMAs/Natural Heritage Areas being placed within Interface and Matrix. Proposed some protection for these areas. Countered that the activities would maintain/protect the value of these areas. Concern is where and how the FS is going to get to conditions, objectives/standards and guidelines needed for ecological restoration.

Suitability Questions (and Discussion):

1. Some lands seem to have high priority for restoration but some of the overlays like regeneration and continuing reentries after DC is met, the more pointed part of that question is if you have lands you wanted to do eco – restoration, could you do that in non-suitable acres? *Go back to description, back to the DC and maintain it. Maybe series of actions to get certain composition, age class. Can say, we're now at that point, its restored. Does that mean we do nothing more? Or do we have to maintain it, still have to go and do subsequent entries (at whatever frequency whether that would be every 20, 40 years or 100 years)?*

But if aiming towards NRV? If your DCs are spelled out in those terms, to create it and maintain it, then there are series of actions. Another aspect to this whole thing is looking at scale. Scale of DCs is important, how you look at it. Example: 100-acre stand. Looking at DC for that stand, it's composition structure, and once its in a restored condition, no need to go back. But for that same 100-acre stand, it is a part of a larger ecosystem. If looking at larger scale it may include

going back for NRV and departure. That same 100 acre might need regeneration harvest because of contribution to the larger landscape goals.

2. Not concerned with suitability as it tells you about DCs for interface and matrix. My question is: Are we talking about age class and shifting mosaics, or are we talking about goal driven restoration to restoration processes? My concern is that we had this astute description about plan scheduled entries which will include a regeneration harvest. That is different from definition of rotational forestry. Where does that come in? *Rotation, it sounds like different viewpoints on rotation. Rotation is the age between the harvest when you created the new stand vs whenever you go back to recreate a new stand. A rotation can be 40 to 250 years. Some may be thinking that "rotational forestry" means the harvest rotation is determined by the CMAI (culmination of mean annual increment). From a "tree plantation" form of management, CMAI would be a determining factor. But for the Forest Service lands, it is the DCs that determine the timing for a regeneration harvest and not CMAI. (But just to clarify, the Forest Service cannot harvest at any time before CMAI is reached except under limited circumstances.)*

Comments from others:

- Whether its 10 or a 200- year rotation, there are places where some would agree never to rotate not in 300 nor in 400 years. The rub is that currently, there's a couple hundred thousand acres of those places in Matrix.
- Restoration reaching a self-sustaining point is fine, if that is the purpose. If the primary goal is restoration and the secondary purpose brings in socio-economic benefits – these are not necessarily mutually exclusive.

Paul continued to say that DCs are the base. If the DC is to maintain that DC, then in order to maintain that, and it could be landscape scale condition, say around NRV, and good to have some ESH age class. If we want that, over the landscape in our DCS, in order to have that range, then there are going to have to be regeneration harvests to have those stands get to ESH. Whatever those lands need to maintain that NRV range, then there is a regeneration aspect to maintaining that range at the landscape level.

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A member from the audience made the following point that a number of Forum members have come to this same discussion point but from different directions: it references the small patches (NAPs) not identified in Matrix. Some members of the Forum do not know that these patches are there, these are not on the maps. Until it was discovered, it has created unnecessary conflict because there were those of us who could not figure out why these areas could not use for timber production. We have to resolve that and come to agreement if we can. If we want them protected, perhaps these should be SIAs, otherwise the general Matrix looks like fair game since these areas are not on the map.

The NAPs are one issue, the other is Interface and Matrix will have DOGS, and these will be oriented towards timber production areas. DOGS drive the management of the stand within those areas. Even though restoration can occur within interface and matrix, you need DOGS that explicitly drive toward ecological restoration for those areas.

Another issue sounds like with timber production, is reentry – what tools can assist? Michelle offered that there are multiple ways and tools - DOGS will drive suitable analysis. There is the MAs GAs goals, many ways to tack that goals.

Another member offered: Is the reason for the concern about the suitability, is it because NAPs exist in those areas? We have a broadcast of suitable classifications about MAs, and there are NAPs there. On private timber land, we provide eco restoration work with a conservancy where we have SNAs listed over a 2,000 tract. The restoration goal of that land owner was able to work around and respect the species by shifting the road. There are dots and circles on the maps; to keep my certification we respect those dots and circles, and still accomplish the goal of the timber stand and the watershed. I hope our discussion can go here. I think you can still operate and achieve restoration goals within a specific suitable context.

Another member expressed the following concerned. The statement that there are another 150,000 200,000 additional acres in Matrix is of special concern. How many thousands of acres in Wilderness, in recreation, in unsuitable, in Old Growth is there now that cannot be used? Might as well go home and turn it over the NPS. I personally value W and OG and I recognize this country has been beaten to death. We just got to pay attention and give time to recover toward all mutually beneficially goals.

Lou, in wrapping up the session ask everyone to thank the US Forest Service presenters. She reminded Forum members about the pending small group discussions being planned for the following topics:

- Scenery
- Recreation
- Old Growth
- NEPA Alternatives
- OC Address Approach Proposal Review (ensure proposals are kept on the table even if someone disagrees with who submitted it or part of it as others will want to review)

And a reminder about upcoming important meeting dates:

- September 1, Friday, Due date to submit collaborative proposals/trial balloons to the NFF
- September 5, Tuesday, NFF will circulate package of proposals to all SF members to begin to review
- Monday, September 25, Lake Logan, 10am - 4pm
- Wednesday, November 8, Lake Logan, 10am – 4pm

Allen expressed his appreciation for the ongoing proposal development using a collaborative design approach that delivers objectives/protects values across the multiple interests.

APPENDIX A: STAKEHOLDERS FORUM – PROPOSAL DEVELOPMENT MESSAGE (8/16/17)

In an effort to make the process very clear and to respond to questions the National Forest Foundation (NFF) has been receiving, here is a description of the proposal development, sharing and decision processes, and a description of what success would look like. We appreciate your feedback on this if anything isn't clear.

1. **PROPOSAL DEVELOPMENT:** We need to clearly separate the proposal development process from the decision process. In proposal development, we expect people to meet the three major criteria we have articulated:

- Your proposal development process is reflective of the diverse interests on the SF.
- You have worked in good faith to ensure that the proposal responds to the variety of interests at the table and will be seriously considered by the SF.
- Proposals are descriptive and understandable by anyone (in other words, they include the context and background needed).

The reason for asking SF members to talk with each other about proposals is because that is the strength a collaborative approach brings – access to people with a diversity of views. We are also trying to build efficiency for all of you in the review and decision process. The SF won't have time to consider individual, single-group or single-interest proposals.

We anticipate proposals are being developed in a variety of ways:

- At the facilitated Geographic Area meetings in July and early August;
- By small groups of Stakeholders Forum members;
- By groups like the FWCC and the Partnership, and perhaps others.

These are all valid and important origins of proposals. We ask that you ensure any proposal meets the above criteria before sending them to the NFF for sharing with the Stakeholders Forum.

As a reminder, here are working definitions:

- ✓ Trial Balloon: a tentative measure taken or statement made to see how a new policy will be received; an idea or hypothetical plan being proposed and/or tested for feedback and general reactions of feasibility and suitability.
- ✓ Proposal: written plan or course of action put forward for consideration or discussion by others.
- ✓ Recommendation: a formalized suggestion (advice, counsel, guidance, direction) to the Forest Service approved by the Stakeholders Forum

2. **SUCCESS:** What would success look like? The Forest Service has been consistent in communicating to the Stakeholders Forum that success is 1) recommendations around which there is agreement; and 2) on forestwide issues/geographic areas where there isn't agreement, a description of the range of disagreement, or in other words, a documentation of the various concerns different interests are expressing. Please note that we understand that there will be a mix of proposals that everyone on the Stakeholders Forum can live with, proposals with parts that people agree on and parts they don't, and issues/proposals around which there is little agreement.

3. **DECISION PROCESS TO CONSIDER WHETHER A PROPOSAL WILL BECOME A RECOMMENDATION:** The NFF will put together a "straw dog" of the proposal consideration and

decision process for the Organizing Committee to review and recommend to the Stakeholders Forum. The goal will be to balance efficiency with the ability for the Stakeholders Forum to discuss the proposals and move them (or not) to a recommendation or a description of the range of disagreement. Ideally, we will be able to circulate a description of the draft decision process by email, and then at the start of the September 25 meeting, we will go over the process and make sure the full SF agrees to it before beginning discussion of proposals. Examples of questions this process should answer are:

- How many times will a proposal be adjusted in an attempt to reach agreement before moving on?
- What is the time frame for making changes?
- What is the priority order of proposals for discussion at the September 25 meeting (for example, GA small group proposals, forestwide proposals with multiple stakeholders providing input; more narrowly-framed proposals)?

4. WHAT IS THE PROCESS TO SHARE PROPOSALS? Here's the plan for submitting proposals to the NFF for circulation to the Stakeholders Forum:

- September 1 – due date to submit collaborative proposals/trial balloons to the NFF
- September 5 – NFF will circulate package of proposals to all SF members for review

The NFF will accept any proposals you have developed (as described above) at any time, and we will post them online as a Google Doc.” On Sep 5, we will distribute all of the proposals by email but in the meantime, anyone can go to the link, look at the proposals and get in touch with the proposal leads. If you have other suggestions on how to share proposals, please share them with the NFF or the Organizing Committee.