

# Appendix III. Sample Evaluation Tools and Change Mechanisms

This appendix provides examples of several of the tools and strategies for evaluating and adapting collaborative resource management that are discussed in the “Closing the Feedback” sourcebook. The after-action worksheet was developed as part of the U.S. Forest Service’s *Empowering Collaborative Stewardship Project*. The other examples are drawn from the rapid assessments.

## After-action Review Worksheet

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# Collaborative Learning

## After-Action Worksheet

AAR Guide (Approx. time %)	AAR Notes
<p><b>1. What did you intend? (20%)</b></p> <ul style="list-style-type: none"> <li>• What were your objectives? Why did you take this action? What were you trying to achieve?</li> <li>• What were the key assignments?</li> </ul>	
<p><b>2. What happened? (&lt;10%)</b></p> <ul style="list-style-type: none"> <li>• Get multiple perspectives: There is no single best story about what happened.</li> <li>• Focus on “facts” (e.g., costs, number of people involved, figures, etc) and “opinions” (e.g., what worked and why, what happened).</li> <li>• No blaming!: Focus on events and what events preceded or followed, not why someone did something or what you thought about it.</li> <li>• Allow very specific comments as well as abstract and conceptual ones</li> </ul>	
<p><b>3. What can we learn about it? (25%)</b></p> <ul style="list-style-type: none"> <li>• What are some plausible explanations for why, when, and where events happened?</li> <li>• A key question is, “what did we do well that we need to discuss or else it will be forgotten?”</li> <li>• Don’t look for blame; look for lessons, including lessons about ‘mistakes’.</li> <li>• Be honest about what questions you still have about what happened and why.</li> </ul>	
<p><b>4. What should we do next time? (40%)</b></p> <ul style="list-style-type: none"> <li>• What worked that may not work again? What worked that you want to repeat? What do you want to do differently?</li> <li>• Spend ~50% of the discussion here to keep from falling into bad habits and failing to start good new ones.</li> </ul>	
<p><b>5. What should we do now? (&lt;10%)</b></p> <ul style="list-style-type: none"> <li>• How will you share these lessons?</li> <li>• Don’t just wait until next time if you can make a difference now.</li> <li>• Be clear about assignments and responsibilities: who will do what by when?</li> </ul>	

## COPWRR Project-Level Ecosystem Monitoring Report Form

<b>Project:</b>
<b>NEPA Authority Used:</b>
<b>Date:</b>
<b>Interdisciplinary Team / Forest Service Members Participating:</b>
<b>Other Participants in Field Evaluation:</b>
<b>Units: Acres in Units:</b>
<b>Other Units being Monitored:</b>

### Background

#### Purpose and Need

*Reference:*

#### Management Objectives for Unit

*References:*

## **Treatment Summary for Unit**

*References:*

## **Selected Implementation Guidelines, Management Measures, and BMPs to Evaluate**

*Reference:*

## Unit Evaluation

Were the treatments implemented as described in the decision document or Record of Decision? Were the treatments implemented in accordance with the Selected Implementation Guidelines, Management Measures, and BMPs identified above? If not, please explain why.

For each Management Objective for this Unit, please evaluate whether the objective has been achieved. If the objective has not been achieved, please comment on barriers, constraints, limitations, etc. and what might be needed for future projects to achieve the objective.

## Project Evaluation

Were the results of this project what was anticipated and intended? Have treatments addressed the Purposes and Needs for this project? If not, why not?

Please share any observations or comments about the project planning, implementation, or results that are important to understanding management of this unit or important for improving future management in similar projects.

**Bankhead Liaison Panel Timber and Thinning Team**

**Checklist for Site Preparation for SPB damaged sites receiving treatments other than thinning, e.g. prep for planting, release treatments, etc.**

Inspection Date: \_\_\_\_\_ Time: \_\_\_\_\_ Age: \_\_\_\_\_  
 Location: Compartment \_\_\_\_\_ Stand \_\_\_\_\_ Acres: \_\_\_\_\_ DFC: \_\_\_\_\_  
 Coordinates: Latitude: \_\_\_\_\_ Longitude: \_\_\_\_\_ Alt: \_\_\_\_\_  
 Original Treatment Date: \_\_\_\_\_ Original Treatment: \_\_\_\_\_  
 Additional Treatment Date: \_\_\_\_\_ Additional Treatment: \_\_\_\_\_

Review Team:

\_\_\_\_\_  
 \_\_\_\_\_

General Site Conditions [ground surface, weather, roads, active operations, geomorphology, natural community type, forest class, etc ]:

\_\_\_\_\_  
 \_\_\_\_\_

General Description of Methods Being Reviewed [Drum chopping, controlled burn, etc. ]

\_\_\_\_\_  
 \_\_\_\_\_

**S= Satisfactory    U= Unsatisfactory    NI = Needs Improvement    Needs Remediation    NA = Not Applicable**

**I Stream Course Protection**

- a. Stream Buffer protected BMP/SMZ \_\_\_\_\_
- b. Mechanical impacts /rutting evidence; % \_\_\_\_\_
- c. Debris removed or prevented from entry \_\_\_\_\_
- d. Culverts, rock, fill materials, silt fences \_\_\_\_\_
- e. Presence of stream crossings \_\_\_\_\_
- f. Evidence of siltation or soil movement \_\_\_\_\_
- g. Evidence of water quality degradation \_\_\_\_\_

**II Erosion Prevention**

- a. Erosion control adequate \_\_\_\_\_
- b. Provisions for long term protection \_\_\_\_\_
- c. Water bars/ locations and function \_\_\_\_\_
- d. Reseeding on erodible areas \_\_\_\_\_

**III Protection of Feature and Elements**

- a. Cultural or Historic Resources \_\_\_\_\_
- b. Rock Shelters, Caves, Outcrops \_\_\_\_\_
- c. Special Areas, seepages, communities \_\_\_\_\_
- d. T&E Species site-specific habitat \_\_\_\_\_
- e. Recreation Trails, facilities etc \_\_\_\_\_
- f. Property Boundaries, fences, corners \_\_\_\_\_

**IV Drum Chopping Operations**

- a. In compliance with unit boundaries \_\_\_\_\_
- b. Only designated trees, sizes and species \_\_\_\_\_
- c. Damage to leave trees \_\_\_\_\_

- d. Damage to residual stand \_\_\_\_\_
- e. Excessive rutting by operations \_\_\_\_\_
- f. Equipment use orderly, workmanship \_\_\_\_\_
- g. Soil disturbance \_\_\_\_\_
- h. Evident site impacts \_\_\_\_\_
- i. Litter & Trash occurrence \_\_\_\_\_

**V Burn Adequacy**

- a. Remain within boundaries \_\_\_\_\_
- b. Burn intensity \_\_\_\_\_
- c. Fire breaks \_\_\_\_\_

**VI Roads and vehicle use**

- a. Appropriate locations and size \_\_\_\_\_
- b. Maintenance and slope protection \_\_\_\_\_
- c. Entrance to public roads protected \_\_\_\_\_
- d. Culverts and physical improvements \_\_\_\_\_
- e. Rutting and water bars \_\_\_\_\_
- f. Oil, fuel spillage evidence \_\_\_\_\_
- g. Minimal roads \_\_\_\_\_

**VII Vegetation Impacts**

- a. Groundcover impacts – grasses, leaf litter \_\_\_\_\_
- b. Duff residual \_\_\_\_\_
- c. Remaining snags \_\_\_\_\_
- d. Revegetation \_\_\_\_\_

*Bankhead Liaison Panel Timber and Thinning Team*

Remarks [Referenced by Item Above]

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Confirmation of USFS Administration Appropriateness [ All public notifications, bidding protocols, NEPA requirements, Contract and Forest Plan compliance, traffic control incidence, fire protections, required USFS inspection reports and verification, Documentation of enforcement, Contract restrictions, documented problems and non-compliance issues, etc.]

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NEPA and Silviculture Prescription Implementation Appropriate [ on-ground Sale Area layout follows approved plan, contract implementation appropriateness, sale administrated according to terms, violations listed, OSHA compliance, etc]

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Additional Comments, Recognitions and Remarks:

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Observation Summary;

Date: \_\_\_\_\_

Consensus of Review Team Established;

Date: \_\_\_\_\_

Observations Presented to USFS District Ranger;

Date: \_\_\_\_\_

Recommended follow-up actions and schedules:

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Recommendations agreed to: \_\_\_\_\_ Date: \_\_\_\_\_



*Bankhead Liaison Panel Timber and Thinning Team*

USFS

Inspection Date: \_\_\_\_\_ Time: \_\_\_\_\_  
Location: Compartment: \_\_\_\_\_ Stand: \_\_\_\_\_ Acres: \_\_\_\_\_ DFC: \_\_\_\_\_

**Photo Spots:**

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Photos stored at: \_\_\_\_\_

**Bankhead Liaison Panel Timber and Thinning Team**

**Checklist for Timber Thinning Site Evaluations**

Inspection Date: \_\_\_\_\_ Time: \_\_\_\_\_ Age: \_\_\_\_\_  
 Location: Compartment: \_\_\_\_\_ Stand: \_\_\_\_\_ Acres: \_\_\_\_\_ DFC: \_\_\_\_\_  
 Coordinates: Latitude: \_\_\_\_\_ Longitude: \_\_\_\_\_ Altitude: \_\_\_\_\_  
 Original Treatment Date: \_\_\_\_\_ Original Treatment: \_\_\_\_\_  
 Additional Treatment Date: \_\_\_\_\_ Additional Treatment: \_\_\_\_\_

Review Team:

\_\_\_\_\_

\_\_\_\_\_

General Site Description [ground surface, access control, protection, roads, active operations, vegetation age, natural community type, forest class, burned, etc]: \_\_\_\_\_

\_\_\_\_\_

General Description of Operation Being Reviewed [Thinning, type of logging, equipment used, etc]: \_\_\_\_\_

\_\_\_\_\_

**S= Satisfactory      U= Unsatisfactory      NI = Needs Improvement      NR = Needs Remediation      NA = Not Applicable**

**I Stream Course Protection**

- a. Stream Buffer protected BMP/SMZ \_\_\_\_\_
- b. Mechanical impacts /rutting evidence; % \_\_\_\_\_
- c. Debris removed or prevented from entry \_\_\_\_\_
- d. Cutting of allowable trees \_\_\_\_\_
- e. Culverts, rock, fill materials, silt fences \_\_\_\_\_
- f. Presence of stream crossings \_\_\_\_\_
- g. Contract Specifications met? (USFS input) \_\_\_\_\_
- h. Evidence of siltation or soil movement \_\_\_\_\_
- i. Evidence of water quality degradation \_\_\_\_\_

**II Erosion Prevention**

- a. Gully or sheet erosion present \_\_\_\_\_
- b. Slash on scarred areas \_\_\_\_\_
- c. Provisions for long term protection \_\_\_\_\_
- d. Water bars/ locations and function \_\_\_\_\_
- e. Reseeding on erodible areas \_\_\_\_\_

**III Protection of Feature and Elements**

- a. Cultural or Historic Resources \_\_\_\_\_
- b. Rock Shelters, Caves, Outcrops \_\_\_\_\_
- c. Special Areas and plant communities \_\_\_\_\_
- d. T&E Species site-specific habitat \_\_\_\_\_
- e. Recreation Trails, facilities etc \_\_\_\_\_
- f. Property Boundaries, fences, corners \_\_\_\_\_

**IV Logging Operations**

- a. Timing of operations \_\_\_\_\_
- b. Operations in compliance with boundaries \_\_\_\_\_
- c. Only designated trees, sizes and species \_\_\_\_\_
- d. Damage to residual stand \_\_\_\_\_
- e. Damage to leave trees \_\_\_\_\_
- f. Hung trees remaining \_\_\_\_\_
- g. Damaged trees removed \_\_\_\_\_
- h. Excessive rutting by operations \_\_\_\_\_

- i. Equipment use orderly, workmanship \_\_\_\_\_
- j. Trash left on site, oil spills \_\_\_\_\_
- k. Evident site impacts \_\_\_\_\_
- l. Directional felling \_\_\_\_\_

**V Slash Disposal Adequacy**

- a. Residual stump height \_\_\_\_\_
- b. Tops removed from trails, roads, special areas, stream courses \_\_\_\_\_
- c. Slash piles size & extent \_\_\_\_\_
- d. Distribution of slash on erodible areas \_\_\_\_\_
- e. Size of Slash deposited \_\_\_\_\_
- f. No slash against leave trees \_\_\_\_\_
- g. Bark thickness at staging areas \_\_\_\_\_

**VI Roads, Skid traces, Staging Areas**

- a. Appropriate locations and size \_\_\_\_\_
- b. Maintenance and slope protection \_\_\_\_\_
- c. Entrance to public roads protected \_\_\_\_\_
- d. Logger follow-up for seeding \_\_\_\_\_
- e. Culverts and physical improvements \_\_\_\_\_
- f. Minimal roads \_\_\_\_\_

**VII Vegetation Impacts**

- a. Groundcover impacts – grasses, leaf litter \_\_\_\_\_
- b. Woody under-story impacts \_\_\_\_\_
- c. Residual Tree Canopy condition \_\_\_\_\_
- d. Revegetation – natural \_\_\_\_\_
- e. Revegetation – artificial \_\_\_\_\_
- f. Visual aspects \_\_\_\_\_
- g. Invasives \_\_\_\_\_

**VIII Burn Adequacy**

- a. Remain within boundaries \_\_\_\_\_
- b. Burn intensity \_\_\_\_\_
- c. Fire breaks \_\_\_\_\_

*Bankhead Liaison Panel Timber and Thinning Team*

Inspection Date: \_\_\_\_\_ Time: \_\_\_\_\_  
Location: Compartment: \_\_\_\_\_ Stand: \_\_\_\_\_ Acres: \_\_\_\_\_ DFC: \_\_\_\_\_

**Photo Spots:**

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*Bankhead Liaison Panel Timber and Thinning Team*

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Location: Compartment: \_\_\_\_\_ Stand: \_\_\_\_\_ Acres: \_\_\_\_\_ DFC: \_\_\_\_\_

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# FIELD VISIT SUMMARY – BASS LAKE RANGER DISTRICT

## Dinkey Collaborative

July 17, 2012

### Dinkey Landscape Restoration Project, Sierra National Forest

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## 1. Action Items

- **SNF STAFF:** Apply strategies from BLRD to the Soaproot project.
- **SNF STAFF:** Obtain overlaying data on the marked clumps, including location and LiDAR and aerial photos, with wildlife data to get a better sense of preferred habitat
- **ANAE OTTO** to distribute Ms. Purcell’s draft photoessay.
- **SNF STAFF:** Develop a series of figures to accompany the guidelines, as done in BLRD

## 2. Welcome and Orientation

Mr. Dave Martin, Bass Lake District Ranger, Sierra National Forest, welcomed all participants to the field visit, noting that the opportunity to share information with Dinkey Collaborative participants about the similarities and differences between his district’s approach and the High Sierra Ranger District. The facilitator, Mr. Dorian Fougères, reviewed the day’s agenda and meeting ground rules

## 3. Sugar Pine Project (Unit T8, Road 5S79)

Ms. Kathryn Napier, District Silviculturalist, oriented the group to the site, noting the area was treated in the fall of 2011, with a fisher den site present in the unit. She noted the project was designed to test the 2004 decision, the use of SPLATs (Strategically Placed Treatments) to prevent catastrophic fires, and adaptive management. Phase 1 of the treatment was complete. She reviewed the prescription for high quality habitat (the full document was handed out and is available under the July 17, 2012, materials on DataBasin.org), which included leaving 210 square feet of basal area/arce; thinning from below; and wildlife criteria. Oaks with a dot also had their surrounding biomass retained to either their dripline or 35’. The area around fisher dens was to be maintained for multiple routes.

- Mr. Mark Smith added that on High Sierra Ranger District, **crews were trained to identify fisher rest sites, rather than having them marked ahead of time**, but the sales

administrator had no way to know what was done. On Bass Lake Ranger District, the fisher rest sites and clumps are marked ahead of time.

- Mr. Jim Fouch, Marking Crew Chief, noted that the crew did not simply stick to the grid. They actively compared distances, with people spaced out around 100 feet apart, looking between the groups and identifying cavities, looking to retain at least 2 per acre for the highest quality habitat.
- Mr. Chad Hanson noted that **numerous habitat elements – shrubs, understory, snags, large downed logs – were missing**, and that snag recruitment would be difficult.
- Ms. Napier noted that the second class included spindly oaks were also retained so long as they were not likely to be overtopped.
  - Mr. Fouch added that crews had to consider the **tradeoffs between a reasonably vigorous small oak, or cutting a larger less vigorous oak**, with an eye toward habitat 15-20 years in the future. This was the planning horizon for the restoration work.
- Ms. Napier noted that the third class included conifer groups, with at least three 30” trees in the group. These had to have touching crowns. All the understory underneath would be retained for the purpose of having ladder trees go up into the canopy and maintaining structural heterogeneity.
- The group noted that one challenge was **how to implement and train the marking crews**. The pre-mark identification of tree clumps increases the pace of the production mark.
  - Mr. Fouch noted that in the Cedar Valley project (visited in the afternoon), trees >20” were marked to retain, but this was not needed here. Here the edge of the clump was considered as a “curtain” dropping down from the edge of the canopy. In this case, one side of the clump was opened; if there had been a better oak, it would have been included, as it would have closed the canopy and increased the value of the clump. Instead, the idea was to open the south side to promote the oak, as there was no coherent conifer clump.
  - Mr. Hanson suggested that this **approach of leaving only the material out to the dripline left the interior very exposed**. Leaving a buffer would be beneficial.
- Regarding **the identification of denning cavities**, Mr. Fouch noted crews were told to look for fist-sized holes, but this was relative. Regarding the identification of resting platforms, crews didn’t have a good sense of the size.
- Ms. Napier noted that decadent trees could be saved as wildlife trees. Wildlife trees included things like forked tops, mistletoe brooms, teakettle branches, and all snags.
- Ms. Napier noted that there were approximately two clumps per acre, on average. It depends on the unit and the natural conditions therein. Mr. Hanson felt this was a low average.
- Mr. Craig Thomas felt the area looked “really good”. He contrasted the area with parts of the Dinkey landscape that were dominated by old white fir, noting that this site had a mix of oak and pine, and served as a source for the fisher population.
  - Ms. Anae Otto clarified that cedar were taken because of the prescription for this test site.
  - Mr. Hanson asked whether Mr. Thomas would approve of such a treatment being conducted at the landscape scale (not in the sense of applying this prescription to literally every acre of land, but in the sense of this prescription being replicated in similar areas across the landscape). Mr. Hanson reiterated his concern that several

habitat elements were missing, and that the potential clump was opened rather than maintained.

- Mr. Thomas replied that he would have liked more heterogeneity, but based on what was available and what remains, he felt the treatment was “outstanding”. The area did not have all the elements, but he doubted larger trees were there, and the snags were not taken. He felt this was a great starting point for exploring treatments where there is active fisher use. He felt the layout was creative, and did not separate the social and ecological components of the landscape.
- Mr. Ramiro Rojas noted that Dinkey North and South were not well used by fisher, and missed structural elements, so there were different retention guidelines. The strategies applied here could be applied in Soaproot: if there was good habitat to start with, and certain qualities were desired, an effort could be made to modify – not remove – the habitat.
  - **ACTION ITEM:** Mr. Rojas suggested the opportunity to apply strategies from BLRD to the Soaproot project, which had more similar vegetation characteristics.
- Mr. Fouch suggested it was important to be able to look for a suite of qualities, rather than a single characteristic.
- The facilitator reiterated a theme that had emerged during the July 16 technical field visit: **the need to always consider treatment within the context of at least three scales: the microsite, the unit, and the watershed or landscape.**
- **ACTION ITEM:** The group requested overlaying data on the marked clumps, including location and LiDAR and aerial photos, with wildlife data to get a better sense of preferred habitat.
- Mr. Thomas suggested **creating a photoessay covering examples of clumps, cavities and platforms, and fisher den and rest sites.**
  - Ms. Otto noted that Ms. Kathryn Purcell had begun developing such a photoessay for Sugar Pine.
  - **ACTION ITEM:** Ms. Otto to distribute Ms. Purcell’s draft photoessay.
- The group expressed concern about **how the area surrounding the main fisher den site was treated**, with all the ground vegetation removed around the tree.
  - Ms. Sue Britting noted that this pointed to a critical question: is it feasible to recognize all these sites, or is it impossible? And if so, was a clump defined tightly or expansively? And then how would commercial operations influence the site?
- Ms. Pam Flick pointed out that the group stood at the end of the unit, which sloped down to a streamside management zone.
- Asked about fire, Ms. Denise Tolmie noted it would likely be low to moderate in this area, killing some smaller trees and potentially some medium trees. As a firefighter, she would feel comfortable fighting or managing fire here. This was one of the goals of the prescriptions.
- Ms. Anne Lombardo noted **the importance of cover near den trees, including the risk of predation**, and suggested paying greater attention to where dead fisher were found.
  - Ms. Britting cautioned that dead animals can be carried a distance. She noted there was an ongoing effort to collar bobcats and mountain lions.

- Mr. Dirk Charley noted the importance of **including the sales administrator and Timber Stand Improvement crews/operators in the learning group**, in addition to the silviculturalist, wildlife biologist, contract administrator, and marking crews, given the need to pick out relatively small habitat elements.
  - Ms. Britting added that a key consideration was, who will use the tool? The marking crew? The operator? Each of the people involved would have to have familiarity, just as is done in plans for reforestation.
  - **ACTION ITEM:** The group suggested developing a series of figures to accompany the guidelines, as done in BLRD.
- Mr. Justin Augustine echoed Mr. Hanson’s concern, noting that he would not want to see this treatment repeated across the landscape, as it did not maintain the natural “messiness” and complexity. If this were done for public safety, that would be different than for ecological restoration.
  - Mr. Martin replied that heterogeneity is a primary objective, and that the Wildlife-Urban Interface (WUI) area is treated differently.
  - Ms. Napier added that in planning the treatment here, the team considers the common stand exam, damage reports, fire modeling, standards & guidelines, wildlife concerns, physical access, and the relationship with adjacent units.
  - Mr. Smith clarified that the purpose of the treatment here was to test the 2004 Framework, specifically the SPLAT strategy. The GTR 200 takes a different approach that is based on zones derived from a combination of slope and aspect, among other criteria.
- Mr. Hanson suggested that Dinkey treatments focus on enhancing ecological heterogeneity, noting that the first draft proposed action for Bald Mountain included snag creation.
- Regarding clumps, Mr. Thomas noted that question include **how far outside a clump should be maintained**, issues of temperature and seasonal considerations (e.g., use during the winter), and the dual use of cover both for fisher foraging as well as preying upon fisher.

#### 4. Cedar Valley Project, Stop 1 (Road 6S97)

Ms. Napier noted that the area had larger trees and structure, and that treatment in this area was complete. Mr. Fouch noted that it had not taken long to go back and revise the original mark based on the revised guidelines, and that there was not a significant change in the volume or number of trees.

- Regarding clumps, Mr. Smith noted that there were five trees greater than 30”, with nearly touching crowns. All were over 20”. The prescription was to thin below 20” in the conifer group to a specific basal area to avoid overstocking, and to treat ladder fuels.
- Mr. Hanson noted that intermediate and large trees were retained and there was a snag group. He felt that the area was nonetheless missing large downed logs, and that additional understory could have been retained around the tree boles.
- Ms. Britting noted that more thought had been given to shrubs after the Cedar Valley work.
- Mr. Martin noted that the work of the Timber Stand Improvement teams after the commercial harvest was changing. Here the emphasis was removing ladder fuels to avoid crown fires. The treatment was not driven by a silvicultural objective. The TSI did not biomass the area. They also employed whole tree yarding versus typical extraction; this can



reduce the need to scatter slash and treat groundfuels. The fuel break provided by the nearby road also increased treatment flexibility.

- Mr. Hanson asked **whether areas for higher intensity burning had been retained**, as they could contribute to a fisher prey base.
  - Ms. Tolmie affirmed that yes, this had been assessed for Cedar Valley because of the amount of area left untreated because of sensitive plants, archaeological sites. Roughly 10-15% was untreated because of this, and the potential for high intensity fire existed in those areas; if the area were drip-torched today, some pockets of high intensity fire would likely occur. Overall around 60% of the land was left untreated and would not be returned to as it was inoperable.
  - Ms. Britting commented that the proportion of land untreated was important to consider, as these constitute a remnant. A better way is needed to account for and describe these areas. They include opportunities to apply different treatments. There is a value to these “no-entry” spaces.
    - Mr. Martin noted that it was difficult to know the final result of a treatment, but over time the accuracy of the estimates could be tracked.
- Mr. Rojas noted that if the High Sierra Ranger District guidelines were applied, the area would be considered moderate or possibly high quality habitat. There were also **opportunities to release pine for growth**. In many areas canyon live oak would be overtopped, so one consideration would be to **create space for oaks**.
  - Mr. Smith noted that BLRD took two approaches to oaks: (1) leave all for fisher benefit, or (2) remove 1 side to enhance growth of remaining oaks.
  - Mr. Rojas commented that the decision would be based on an assessment of the value of the oak relative to either (1) rot or cavity creation, which is beneficial for fisher, or (2) it’s ability to grow and expand its crown if given greater exposure. In young trees it may be hard to see the rot, but it exists in almost all oaks. He suggested that if oaks were abundant in an area, the highest quality oaks would be retained, whereas if fewer oaks were available, lower quality trees would necessarily be maintained. More oaks would also be maintained near creeks.
  - Mr. Smith observed that both districts were moving away from keeping every single oak, while still maintaining wildlife benefits.
- Ms. Tolmie commented that with regard to the **white fir coming back in the understory**, ideally the area would be burned again in 2-3 years. Prescribed burns would be planned based on (1) WUI requirements, and (2) the risk of the fire escaping. Ecologically this would best occur in the fall, but that increased the risk of escape and air quality concerns. A spring burn would still kill the fir. A TSI crew could be used, although fire would be preferable.
- Mr. Rojas noted that 12”, 16”, and 18” pine were missing, which would be the future generation.
  - Mr. Martin noted that the area did not lend itself to this. A lot of releasable pine cannot be promoted because there are larger trees around the oaks that are retained.
  - Mr. Rojas noted that a big issue in the Bear Fen area is that oaks are senescing. Dinkey North and South focused on using existing openings to promote pine.

## 5. Cedar Valley Project, Stop 2 (Road 6S97)

Mr. Smith noted that he had anticipated more lower level canopy removal in the area, and/or that the understory had returned more rapidly than he expected. He asked the group explicitly what might be done with the cedar adjacent to the main clump, with the three large pines that were not part of the clump and the nearby debris.

- Mr. Larry Duysen noted that the area had been cleaner after initial treatment, but then blowdown occurred, adding material to the ground.
- Mr. Hanson emphasized it was important to **distinguish between public safety and forest management objectives** in the area; this would change what should be done.
- Ms. Britting noted that the structure is so large that if the surrounding area would be thinned, there would be even greater height to live crown. She suggested that in general the **treatments should look to soften the edges of clumps while being mindful of ladder fuels**. Behind the three pines, she would remove more material, thinning or removing of the understory, depending on what was on the far side of the pine. Looking downhill, she was not sure how to promote pine; the area was presumably wetter.
  - Mr. Smith suggested that next to the clump he would keep the large cedar but cut the 12" trees, and remove the material to the right, maintaining the ramp tree. Near the three large pines he would open the area for pine benefit. Downhill he would cut all the cedar, perhaps maintaining one large one.
  - Mr. Rojas echoed that he would soften the edge of the clump where fisher could go up or have hiding cover. Behind the three pines he would maybe leave fewer fir and cedar, and maybe encourage natural pine regeneration in the opening. If the area were to be burned again, he would consider creating a tractor line around the young trees.
  - Mr. Thomas suggested replacing the cedar with pine.
  - Mr. Rojas reiterated that the prescription here had been to thin from below, so trees were removed, likely because they were suppressed. In Dinkey North and South the prescription was to thin throughout a diameter class.
- Mr. Hanson suggested that **a lot of intermediate pine were removed from the area**, and expressed concern that this now justified removing fir and cedar to recreate the intermediate pine that were removed. He noted that fir and cedar may be important for fisher. He suggested that historically there had been dense fir and cedar at this elevation. He disagreed with characterizations of the area as open park-like stands, based on the early 19<sup>th</sup> century. He suggested there was a **broader set of data to examine**, and that open pine stands occupied only a portion of the landscape.
- Mr. Thomas noted it was confusing when the management objective was unclear (hence the value of designating areas of emphasis). He asked that if burning was not possible, how else could one get more pine over the long-term?
- Ms. Lombardo suggested that pine could possibly be planted in small groups, and that it was unlikely that enough fire could be used to meet objectives across the land.
  - Mr. Smith suggested that creating openings was an important strategy in the absence of fire.

Mr. Hanson commented that he did not believe the work of the Dinkey Collaborative would have value if as part of the Forest Plan revision process, **wildlife viability requirements** were not upheld.

- Mr. Thomas suggested that he believed that if people worked together face-to-face, they would find that they are not so different, and that everyone cares about these issues. Rigid rules were not the only option. Monitoring was critical. The group was taking risks because it needed to figure out what happens with different treatments and what to do in these areas. Without the engagement of stakeholders and scientists, the process would break down.
- Mr. Martin emphasized that interdisciplinary meetings and species viability was as or more important than anything else the district does. District staff consistently have conversations about the relationship between wildlife and treatments.
- Ms. Britting echoed the importance of the **Forest Plan** and how it frames issues, and that this was not resolved by the national planning rule. As an early adopter forest, Sierra National Forest would have to grapple with **how to frame the plan around values**.

## 6. Attendees

- |                       |                          |                        |
|-----------------------|--------------------------|------------------------|
| 1. Justin Augustine   | 11. Dorian Fougères, CCP | 20. Peter Nelson       |
| 2. Rich Bagley        | 12. Rebecca Garcia, SNF  | 21. Anae Otto, SNF     |
| 3. Keith Ballard, SNF | 13. Chaturhika           | 22. Ramiro Rojas, SNF  |
| 4. Sue Britting       | Goonawardena, SNF        | 23. Mark Smith         |
| 5. Dirk Charley, SNF  | 14. Chad Hanson          | 24. Zach Tane, SNF     |
| 6. Narvell Connor     | 15. Stan Harger          | 25. Craig Thomas       |
| 7. Kent Duysen        | 16. Andy Hosford, SNF    | 26. Denise Tolmie, SNF |
| 8. Larry Duysen       | 17. Anne Lombardo        | 27. Mandy Vance        |
| 9. Pam Flick          | 18. Dave Martin, SNF     | 28. Stan Van Velsor    |
| 10. Jim Fouch, SNF    | 19. Kathryn Napier, SNF  |                        |

# MEETING SUMMARY | Dinkey Collaborative Full Group

January 19, 2012

Dinkey Landscape Restoration Project, Sierra National Forest

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## Action Items and Agreements

1. **DAN JIRON** to send information on the Southern Sierra Fisher Strategy.
2. **DORIAN** to schedule a full collaborative landscape planning webinar for the month of February.

### Agreements

1. Members signed the letter of support and indicated their level of support for the CBI proposal. Mr. Hanson and Mr. Kangas opposed the CBI proposal. A full list of signatories and reservations is provided in the text below.
2. Members signed the letter of support and indicated their level of support for the Sierra Foothill Conservancy/Cold Springs Rancheria proposal. A full list of signatories and reservations is provided in the text below.

## 1. Welcome and Introductions

Mr. Mosé Jones-Yellin, Deputy District Ranger, High Sierra Ranger District (HSRD), Sierra National Forest (SNF), welcomed all participants to the full Collaborative meeting and reviewed the agenda. Mr. Mosé Jones-Yellin also thanked Mr. Dan Jiron, Mr. Scott Armentrout, and Mr. Ray Porter for their attendance and participation with the Collaborative.

All meeting materials are posted to the group’s site on Databasin.org.

## 2. Leadership Conversation

The Dinkey Collaborative began by welcoming key leaders from the Forest Service: Mr. Dan Jiron, Deputy Regional Forester Region 5; Mr. Scott Armentrout, Supervisor, SNF; and Mr. Ray Porter, District Ranger, HSRD, SNF. Before comments and questions for the guests began, the group was to consider the question, “what would you like the leadership’s perspective on?”

Mr. Porter commented that the DLRP Collaborative is making progress, and expressed that Dinkey North and South are positive products from the Collaborative. He also stated that the Collaborative process is slow, and he further expressed a desire for the group to accelerate the planning process. Mr. Armentrout applauded the group for handling issues and the continued leadership engagement. He thanked Mr. Jones-Yellin for meeting the needs of the collaborative, and congratulated him on a job well done. Mr. Armentrout noted that the input from the Collaborative shaped the current projects being implemented. He also stated that members cannot agree upon every issue fully, but there can be progress made without litigation.

Mr. Jiron also thanked all the members for their commitment to the Collaborative, and continued to emphasize the progress that is made by learning from one another. Mr. Jiron stated that Mr. Armentrout delivers the DLRP Collaborative reports, and he is regularly informed of the group’s progress. Mr. Jiron expressed the importance of issues such as Sierra Nevada Ecosystem Project (SNEP), owl, fisher, and budget. Mr. Jiron stated that SNEP has concerns about funding, and expressed that the Region’s commitment to acquire funds through aid from the Forest Service and the State of California was still on going. He also commented that budget decisions are a challenge when attempting to consider the right investments. Mr. Jiron expressed that the spotted owl will continue to receive support, and noted that there is encouragement among scientist to analyze data for future use. He noted that the fisher will also continue to receive funding, and would like to see collaboration with the Fish and Wildlife Service to assist with Forest Plan revisions. He explained that he has contacted the Fish and Wildlife Service, in Washington and Oregon State, for future fisher collaboration. Mr. Jiron expressed the importance of revising Forest Plans to reflect the current data analysis. Mr. Jiron touched on the recent budget issues. He explained that the budget is unpredictable due to the threats of government shut downs. Mr. Jiron said that he is working on keeping the budget a priority for the Dinkey Collaborative, and further stated his hopes to gather a budget earlier in the year to ease the Collaborative’s decision-making process.

- Mr. Steve Haze asked about the future of the Kings River Experimental Watershed (KREW), and stated his interest in the future environmental impacts of the project.
- Mr. Stan Van Velsor inquired about the route of funding to the CFLR budget, and if the money received from Washington D.C. will be direct, as opposed to going through the region. He also asked when the budget would be available.
- Mr. Craig Thomas noted the importance of Mr. Jiron’s funding work, and wanted Mr. Jiron’s help to work out the issues on fisher management.

- Mr. Armentrout addressed Mr. Haze's concern about the future of KREW, and stated that the project is a high priority for funding. Mr. Porter added the watershed experiment portion and the research of KREW would be advancing forward.
- Mr. Jiron responded to Mr. Thomas about considering the best approach to the fisher management issues. Mr. Jiron noted that there is communication with the Fish and Wildlife Service and Jane Hayes, deputy director, to aid with complex issues due to fisher management. Mr. Jiron stated that there is no concrete answer when entering decision making for management issues.
- Mr. Jiron answered Mr. Van Velsor's budget question, and stated that getting funding direct from Washington is not possible. Mr. Jiron conveyed that Region 5 feels the Collaborative is a priority, and will receive funding. He continued to state the importance of implementing the work completed in collaborative meetings, and suggested the budget completion be in early spring.
- Mr. Mark Smith inquired about how proceed with the fisher strategy, and how Mr. Jones-Yellin would be able to convey the status on the Southern Sierra fisher conservation strategy to the Dinkey Collaborative group.
- Mr. Kent Duysen commented that there will be a fisher strategy released.
- Ms. Pamela Flick inquired about the priorities in the Sierra Region and if the region had interest in other collaborative groups.
- Mr. Armentrout asked Mr. Jones-Yellin on his status of reaching information on the Southern Sierra Fisher Conservation Strategy. Mr. Jones-Yellin replied he recently talked with Barney Gant and the response was supportive of the Southern Sierra Fisher Conservation Strategy. Mr. Jiron noted that he would share available information on the Southern Sierra Fisher Strategy with the members of the DLRP Collaborative.

**ACTION ITEM:** DAN JIRON to send information on the Southern Sierra Fisher Strategy.

Mr. Jiron suggested that to move forward with the planning process, the group needs to find harmony among the issues. Mr. Jiron proposed that plans should be adapted to emerging science and data collected. He also expressed that the forest plans are unique to each site. Mr. Jiron stated to ensure adaptive measures, analysis on each site is important to avoid failures. Mr. Jiron addressed other important areas in California that need attention such as projects featuring Southern California chaparral, Lake Tahoe basin, and the Quincy Library Group.

Mr. Ron Goode expressed his liking for the Collaborative meetings, but also felt that little work is achieved. He also said the money should be allocated from the meetings to field work, and he felt that more should be happening in result of the Collaborative meetings.

Mr. Jiron responded by commenting on many projects currently in the implementation stages. He also stated the desire to increase the acres treated, but did agree with Mr. Goode that more needs to be done. Mr. Jiron expressed his interest in working with community groups. Mr. Jiron further commented on the need for more to be done, and highlighted the unity and efforts of

the Amador Calaveras Consensus Group (ACCG). Mr. Jiron added that the collaborative cannot fix every problem but suggested that a collaborative needs to define their role within the local community.

Mr. Haze noted that the DLRP is looking at working landscapes, and is currently compiling a communication plan. He asked how to get the local community involved because they are not aware of the developing plans. Mr. Armentrout responded to Mr. Haze by noting there is a commitment to increase involvement through better communication. Mr. Porter added that the Forest Service pre-work has changed, and collaborative decisions are significant in project implementation. He also agreed with Mr. Goode in regards to wanting more projects implemented.

Mr. Chad Hanson noted that most of the discussions in the meeting are focused on restoration and resilience, and there is not much conversation on the differentiation between categories. He also raised concern with not identifying the difference in treatments ecologically, and further expressed that he has not seen credible information. Mr. Hanson questioned how to evaluate biodiversity.

Mr. Jiron noted that this topic was a large conversation, and meetings could be held on solely that one topic. Mr. Jiron stated that there needs to be an analysis to identify the type of monitoring approach, and then understand what can be done within budget. Mr. Jiron felt it was important to work together in creating a monitoring process, but also recognized that no decision is final due to emerging science. Mr. Jiron noted the need for the forest to function properly with the role of fire. He continued to comment on the importance of reintroducing fire in the forest for restoring ecosystems. Mr. Jiron stated concerns with prescribed fire issues and the direct effect to the air quality in California. He commented on the importance of working with the Environmental Protection Agency (EPA) to balance fire in the landscape with negative impacts of air quality and health concerns. Mr. Armentrout noted there is not a consensus on the diameter issues of trees. He suggested continuing to advance the decision making process, and try to produce a consensus. Mr. Porter appreciated Mr. Hanson's insight, and suggested that expressing opinions and listening is the best way to work together to produce a project.

### **3. Conservation Biology Institute (CBI) Revised Proposal**

The Conservation Biology Institute presented a revised proposal handout to the DLRP Collaborative with intention of gaining the group's support. (The initial proposal was presented in December, after which a special webinar was held to provide further feedback, and the revised proposal distributed a week in advance of the meeting.) Ms. Susan Antenen and Mr. Wayne Spencer, via telephone, reviewed the written proposal handout. A letter of support was offered to members of the Collaborative, and members were able to choose the desired level of support for the CBI proposal.

Mr. Craig Thompson explained that the CBI is proposing a framework for a fisher decision making process, and stated his support for the proposal. He also stated that the Fish and Wildlife Service faced the same questions in regards to fisher management.

Mr. Hanson noted that there was no option for opposing the proposal, and also stated his concern for his opposition going undocumented. Mr. Hanson expressed two main concerns with the proposal. He stated that the proposal assumed high intensity fire results in fisher habitat loss, and commented that the proposal states an inaccurate assumption that trees experience almost complete mortality when a fire burns. Mr. Hanson expressed that the mortality rate was not supported by current data. Mr. Dorian Fougères assured Mr. Hanson that his position would be documented.

Ms. Sue Britting inquired about the application of the proposal for fisher management in the Southern Sierra Region. She followed with stating that the planning framework can help sort areas of concern for fisher management.

Mr. Ramiro Rojas stated that the proposal was a great model, but commented that boundary lines on a map might not accurately reflect or allow for assessments of real field conditions. The model must support implementation. Mr. Rojas also mentioned the importance of using specific measurements and outputs in the fisher decision framework, and the relation of the fishers to fire.

Mr. Spencer responded to Mr. Rojas by explaining the fire modeling was not included in the proposal, and that they will work on defining usable metrics. Mr. Spencer understood Mr. Rojas' concerns about defining boundaries, and the importance of creating a process for fisher management. He also addressed Mr. Hanson's concerns about fisher mortality assumptions, explaining that the proposal did not use the models that Mr. Hanson noted.

Ms Carolyn Ballard stated that she had worked with a former modeler for the Rocky Mountain Institute, and he would like to use the DLRP project as a case study. Ms. Ballard also noted that treatments for fisher management can involve both vegetation and fire.

Mr. Hanson questioned the clarity of paragraphs two and three in the proposal document, and suggested that the information was based on hypothetical scenarios. Mr. Spencer stated the proposal contains uncertainties and is currently evolving. He further explained the mapping characteristics, and stated once the site area is mapped, settings can be manipulated resulting in a clear fisher management decision-making process.

Mr. Haze inquired about the Forest Service's support with the CBI proposal. Mr. Jones-Yellin responded by stating the Forest Service contributed the data, and will continue to work with the Conservation Biology Institute.



**RECOMMENDATION:** Members signed the letter of support and indicated their level of support for the CBI proposal. Mr. Hanson and Mr. Kangas opposed the CBI proposal. A full list of signatories and reservations is provided here:

### **List of those who support the proposal**

1. Pamela Flick, Defenders of Wildlife: full support
2. Craig Thomas and Susan Britting, Sierra Forest Legacy: full support
3. Stan Van Velsor, The Wilderness Society: full support
4. John R. Mount, interested forester: with reservations (no explanation attached)
5. Richard Bagley, Highway 168 Fire Safe Council and Edison Forestry: full support
6. Kent Duysen, Sierra Forest Products: with reservations
  - a. Explanation: Will output matrix be useful for the people who have to make decisions and work in the field? Is the line on the map simply a fisher protected activity center? (Stay out, etc.) As long as Craig Thompson is fully engaged, I would feel comfortable.
7. Larry Duysen, Sierra Forest Products: full support
8. Mark T. Smith, interested forester: full support
9. Steve Haze, Yosemite Sequoia Resource Conservation and Development Council: full support
  - a. Clarification that support is premised on the US Forest Service also clearly indicating its support of the proposal

### **List of those who do not support the proposal**

1. Rich Kangas, Sierra Club, Tehipite Chapter
2. Chad Hanson, John Muir Project
  - a. Explanation: CBI asked the Dinkey Collaborative Group to comment on its proposal (dated 1/12/12). I oppose the CBI proposal for two main reasons.

First, on page one the proposal describes wildland fire only in negative terms – i.e., in terms of risk or adverse impacts – with regard to Pacific fishers. There is no scientific basis for this assumption, as it has not been empirically tested, at least not at a sufficiently large spatial scale or without the confounding effects of post-fire logging.

Second, on page two the proposal says the goal is to create a decision-support framework based upon certain studies, including Thompson et al. (2011). However, Thompson et al. (2011) assumes a 90% mortality level for wildland fire as part of a “what if” modeling exercise. It does not reflect actual wildland fire mortality levels, which average only about 20% over the past 10-20 years. If the 90% fire mortality assumption is used to evaluate balance-of-risks between thinning/logging and fire, it would inaccurately stack the deck in favor of logging, such that only a complete clearcut would be reported as a greater risk than fire under such an erroneous assumption.

Sincerely, Chad Hanson, Ph.D.

## 4. Opportunity to Support Sierra Foothill Conservancy Proposal

Mr. John Mount presented the Sierra Foothill Conservancy Proposal, and sought support from the Collaborative group for the grant proposal. The proposal included collaboration with Cold Springs Rancheria and the Sierra Nevada Conservancy. He highlighted the goals of returning the area to include natural native vegetation, fire hazard reduction, and management of grazing. Mr. Jones-Yellin stated that Mr. Mount contacted him with the proposal, and Mr. Jones-Yellin expressed his support for the proposal because he felt the plan contained positive improvements for the site.

Mr. Thompson agreed that a plan should be developed for the proposed site, and added that the site needs a maintenance budget. Ms Britting asked Mr. Jones-Yellin to see the complete management plan to make a decision in support for the proposal. Ms. Ballard stated that she visited the site, and participated in a conversation about fuel treatments. She also suggested a collaborative field visit to the site. Ms. Cindy Whelan inquired about California Environmental Quality Act (CEQA), and whether it would affect the proposal.

**RECOMMENDATION:** Members signed the letter of support and indicated their level of support for the Sierra Foothill Conservancy/Cold Springs Rancheria proposal. A full list of signatories and reservations is provided here:

1. Raymond Laclergue, Intermountain Nursery: full support
2. Steve Haze, Yosemite Sequoia Resource Conservation and Development Council: full support
  - a. Clarification that support is premised on the US Forest Service also clearly indicating its support of the proposal
3. Larry Duysen, Sierra Forest Products: full support
4. John Mount, interested forester: full support
5. Richard Bagley, Highway 168 Fire Safe Council and Edison Forestry: full support
6. Rich Kangas, Sierra Club, Tehipite Chapter: support with reservations
  - a. Reservation: Use of the term “catastrophic fire” is not needed. It is possible that fire was intense over a greater area than could have been expected because of logging, lack of slash removal, and fire suppression prior to a fire start. Intense fire is not uncharacteristic on its own. Intense fire occurs and is of benefit to ecosystem processes in its own way. Intense fire contributes to heterogeneity across the landscape.

## 5. Landscape Planning Part 1 – Overview

Mr. Jones-Yellin introduced the framework for the landscape planning by distributing the presentation handout. Mr. Jones-Yellin noted that he was changing his original strategy, the “Big Gulp” approach, for a different approach. He expressed that the previous method increased the opportunity for planning obstructions, and limited the capacity for thorough

project analysis. Mr. Jones-Yellin expressed his hopes for discussing potential boundaries at the next full collaborative meeting on March 15, 2012. He also stated his goal to publish a notice of intent by the end of July. Mr. Jones-Yellin noted that moving forward would entail more communication and agreement on management actions.

Mr. Van Velsor inquired about the content and the defined area that is projected to be included in the notice of intent. Mr. Hanson also questioned the structure for the approving content. Mr. Jones-Yellin explained the contents presented are consistent to the discussions in the collaborative meetings. Mr. Hanson noted that he worked with projects that dealt with thinning of trees, and further expressed his desire to focus exclusively on small diameter trees. Mr. Haze commented that every option is explored in the group's approach, and further explained that it is a process, which requires consensus. Mr. Hanson expressed that he did not want to see the removal of large trees because he did not see the benefits.

Mr. Smith commented that due to the new approach, there is still value in grouping similar sites together for one project analysis. Mr. Jones-Yellin responded in agreement that if an area of land is continuous, then one National Environmental Policy Act (NEPA) document is appropriate. Ms. Britting noted that the assessment of a site should drive the action, and did not feel appropriate site assessments were produced. Mr. Jones-Yellin responded to Ms. Britting by stating the process for assessing the current landscape has begun, and explained that the current environment will be compared to desirable conditions. He continued to discuss the importance of tackling issues with the high quality fisher habitat. Mr. Hanson questioned the methods for conducting that conversation. Mr. Jones-Yellin assured Mr. Hanson that a lot of work would be done in attempts to getting that piece prepared for discussion.

Mr. Kent Duysen felt that the future agendas were aggressive, and asked if a webinar could be scheduled for February, since the next meeting was moved to March. Ms. Flick agreed with Mr. Duysen for a possible meeting before March.

**ACTION ITEM: DORIAN** to schedule a full collaborative landscape planning webinar for the month of February.

- Mr. Haze asked Mr. Jones-Yellin if there were disagreements would the decision process stop, and would there be a modification.
- Mr. Thomas asked if Mr. Jones-Yellin will provide boundary options with the proposal.
- Mr. Van Velsor inquired about the previous sites discussed in the meetings, and if those sites will be possible options for the project boundaries.
- Mr. Duysen added that field visits allow clarifications for motives behind restoration.

Mr. Jones-Yellin replied with hoping for an agreement on boundary area by the March 15th meeting, and also stated that treatments will be identified for the agreed upon areas. He noted that if necessary, adjustments to the treatments and boundary areas would be made. Mr. Jones-Yellin expressed that the goal for March is to provide preliminary boundary materials.

Mr. Jones-Yellin assured that the boundaries will overlap the sites previously discussed.

Mr. Haze suggested that there is an opportunity to invite the public to field visits. Ms. Flick noted that the project's parameters are complex, and challenges the effectiveness of bringing the public up to speed with the members of the collaborative.

## 6. Landscape Planning Part 2 – Management Plan Action Categories

Mr. Fougères allowed time to review the handout, and reminded members to evaluate any missing potentials, categories, or clarifications.

- Ms. Flick pointed out making mixed conifer its own category, and to call out other forest types.
- Mr. Hanson noted changing language for 3D, 4D, and 6C. He noted 6C should read, "...heterogeneity increase habitat quality." Mr. Hanson also felt that the mention of the GTR 220 should be deleted. Mr. Rojas expressed that if you change 6c, as suggested by Mr. Hanson, then the statement would be too vague, and therefore 6c would have to include both heterogeneity positives and negatives. Mr. Smith stated Mr. Hanson's suggestion would also leave out plant species.
- Mr. Van Velsor felt that the categories in the handout were general, and therefore was unable to comment. He expressed that he did not support 3A.
- Mr. Dirk Charley stated the watershed category was missing, and also suggested a remediation category for any illegal crops in the area.
- Ms. Britting suggested breaking categories into aquatics, and also noted adding road realignment and under forest maintenance (maintaining healthy forests by analyzing disturbance levels and species composition). She also stated that many items in the handout were not actions, and noted most were objectives.
- Mr. Rich Kangas suggested on category 2 to add restricting grazing, and to redefine "woody".
- Mr. Goode suggested that action category 1 and 3 should add channel morphology, and under category 4 invasive aquatic species. He noted to remove the word "significant" from category 5, and instead use cultural species native to the area. Mr. Kangas also suggested using the wording restoring historical meadows, instead of saying meadow restoration.
- Mr. Rojas stated youth education and labor are missing categories.
- Mr. Andy Hosford noted under category 1 to add motorized trail maintenance.
- Mr. Hanson followed up by stating category 6c could say improve animal and plant species of conservation concern.
- Ms. Flick suggested under category 2 adding aspen restoration for meadow plant communities, removal of livestock, aquatic habitat, and range management.
- Mr. Larry Duysen stated category 10 should include noxious weeds management.
- Mr. Goode noted the importance of creating education opportunities.

- Mr. Van Velsor felt that 5-10 were objectives, while 1-4 were more associated with management actions.

## 7. Landscape Planning Part 3 – Initial Sorting of Management Actions

The group activity was to decide which management actions were found to have general consensus. The group first focused on erosion control, and Mr. Hosford mentioned the importance of creating water bars, rolling dips, ditching, and cleaning culverts as methods to achieving erosion management. Mr. Jones-Yellin noted there are more strategies not listed. Mr. Goode suggested meadow and stream restoration, as well as planting native plants. The group agreed that no one was opposed to erosion control.

The next strategy the group discussed was channel stabilization. Mr. Van Velsor noted the Best Management Practices (BMP) standards associated with channel stabilization. Mr. Kangas mentioned that streams naturally meander, and he stated that channel stabilization could lead to the “pond and plug” method (digging out an eroded channel, filling in certain sections, and flowing over other sections of the eroded channel). Ms. Flick noted the case for naturally occurring erosion in meadows. Ms. Ballard commented that the strategies for channel stabilization might have to be decided case by case.

Ms. Ballard explained a situation where soil protection is needed. She used the example of soil compaction due to excess moisture. Mr. Hosford added that rocking the road and BMP’s aid in soil protection. Mr. Rojas noted another method of ripping soil to loosen compaction. Mr. Van Velsor suggested closing soil sensitive areas to motorized vehicles. Mr. Goode discussed considering trail closure or trail reroute. Mr. Ray Laclergue stated that high intensity fires leave soil vulnerable to erosion near channels. Mr. Hanson noted that high intensity fires are a natural part of the cycle, and is not in support of ceasing the use of high intensity fires.

Mr. Hosford reiterated the importance of water bars, rolling dips, grading and roadside ditch maintenance for road maintenance. Mr. Hanson expressed that he is not concerned with road maintenance. Ms. Britting noted that hazardous tree removal was included with road maintenance, which created controversy and a lack of consensus. Therefore, the group noted that road maintenance was less prone to consensus.

Mr. Smith noted that grouping issues would be helpful. Mr. Jones-Yellin expressed that the exercise was geared to focusing efforts on issues that lacked consensus. Ms. Ballard suggested members create their own categories of issues, and organize them accordingly. Ms. Britting added to concentrate on the issues with general agreement.

Mr. Fougères suggested that ending the exercise as it was leading to further differentiation of minor issues and not helping advance discussions. Mr. Thomas suggested that the group should spend its time on areas where there is clear disagreement, most of which are already

known, rather than trying to identify and sort every possible issue. The facilitator agreed to work with Mr. Jones-Yellin and come back with improved planning material for the February webinar and March meeting.

## 8. Landscape Planning Part 4 – Conclusion and Next Steps

Mr. Fougères suggested revising the landscape planning process. He also noted the challenges with the sheer scale of the Dinkey site, and identifying the proposed project site. Mr. Jones-Yellin felt that the work presented on March 15 will lead to areas of general agreement. He stated the exercise was to identify issues, and lead to resolution across the landscape. Mr. Laclergue expressed his agreement with Mr. Thomas that every site is unique, but agrees with Mr. Jones-Yellin that some treatments can be identified in advance. Mr. Jones-Yellin explained his expectations for the exercise, and anticipated identifying critical issues for further discussion. He expressed confidence in the ability of specialists to help identify project areas and concerns, and noted that much of this work would be informed by field surveys and Collaborative field visits.

## 9. Work Group Updates

**Regarding fisher research,** Mr. Thompson explained that he and Ms. Ballard are discussing locations, which coordinate with the burn plan. He noted that there are many site opportunities. Mr. Thompson stated they were working on analyzing the impacts of low intensity burns and the condition of the cavities.

**Regarding monitoring,** Mr. Stan Van Velsor presented the monitoring work group handout. He briefly reviewed the document, and identified the long-term and short-term planning process. Mr. Van Velsor stated that he plans to get the monitoring matrix operational. He also updated the group with the socioeconomic proposal, which is being drafted by Mr. Jonathon Kusel. Mr. Van Velsor also noted that they have authorization to hire a part time coordinator for the monitoring group, and they aim to have the position filled by April. Mr. Rojas commented that the monitoring coordinator's job is to analyze and make appropriate implementation decisions in the landscape. Mr. Van Velsor also asked Mr. Jones-Yellin for the Forest Service's 2012 Work Plan for monitoring, so the group can suggest monitoring strategies. Mr. Van Velsor expressed that he anticipates presenting the group with monitoring strategies in March. Mr. Jones-Yellin suggested the monitoring group work with the Forest Service to provide extra monitoring assistance.

**Regarding Dinkey North and South,** the collaborative members discussed the updates with the Dinkey North and South projects. Mr. Rojas and Mr. Mount expressed their desire to take another site visit. The group discussed plans to set a conference call in February. Mr. Smith noted the importance of inviting Kirby Mollen (spell?) to join the conversation. Mr. Thomas informed the group that Mr. Thompson will be presenting a piece on fisher at the meeting in March.

**Regarding ladder fuel marking guidelines**, the group continued discussing updates for implementation tools and marketing guidelines. The members suggested that the group make revisions and come to high level conceptual agreement; then present it to the collaborative. Mr. Rojas informed the group that they are investigating latter fuels, and compiling a treatments guide for onsite crews.

**Regarding communication and education**, Ms. Flick presented the updates for the communication plan, and distributed a handout and fliers. Ms. Flick stated that she was working with Ms. Rebecca Garcia and Mr. Haze on the communication plan. She explained that they added strategies and contact information to the plan. Ms. Flick noted the plan would be updated and ready for review by the group on March 15. Mr. Charley stated the importance of marketing to the local community, and felt that all DLRP Collaborative members market the group's intentions and goals. Mr. Haze commented on creating marketing protocols, so the correct intent of the meeting gets shared with the community. Mr. Goode agreed with addressing and informing the public about Collaborative meetings.

**Regarding the evaluation of the 2011 collaborative process**, Mr. Fougères briefly went through the summary and highlighted important next steps to improve the process. Important evaluations he mentioned included the following:

1. Continued careful documentation of group recommendations, decisions and agreements.
2. Clarification of the variety of valid information sources.
3. Cultivation of greater comfort with conflicting perspectives and healthy debate, needs for education, greater exploration of interests, and corresponding responsibility for proposing inclusive alternatives.
4. Recruitment of stakeholders to fill key gaps.
5. Incorporation of local beneficiaries in project planning.
6. Continued capacity-building with work groups.
7. Encouragement of executive engagement.
8. Clarification of how field trip discussions will inform project planning.
9. Support of Forest Service project management.
10. Refinement of the joint fact-finding process.

Mr. Jones-Yellin thanked members for their participation and closed the meeting.

## 10. Attendees

- |                          |                          |                                |
|--------------------------|--------------------------|--------------------------------|
| 1. Scott Armentrout      | 8. Larry Duysen          | 15. Steve Haze                 |
| 2. Susan Antenen, CBI    | 9. Pamela Flick          | 16. Andy Hosford               |
| 3. Rich Bagley           | 10. Dorian Fougères, CCP | 17. Daniel Jiron               |
| 4. Carolyn Ballard, USFS | 11. Lisa Garcia          | 18. Mosé Jones-Yellin,<br>USFS |
| 5. Sue Britting          | 12. Gabriella Golik, CCP | 19. Rich Kangas                |
| 6. Dirk Charley          | 13. Ron W. Goode         | 20. Ray Laclergue              |
| 7. Kent Duysen           | 14. Chad Hanson          |                                |

21. John Mount  
22. Ray Porter  
23. Ramiro Rojas, USFS  
24. Mark Smith

25. Kim Sorini-Wilson,  
USFS  
26. Wayne Spencer, CBI,  
via telephone  
27. Craig Thomas

28. Craig Thompson, USFS  
29. Stan Van Velsor  
30. Cindy Whelan, USFS  
31. Deb Whitall



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**MEMORANDUM**

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**TO:** WILLIAM WOOD, SALMON-CHALLIS NATIONAL FOREST SUPERVISOR  
**FROM:** GINA KNUDSON, LEMHI COUNTY FOREST RESTORATION GROUP COORDINATOR  
**SUBJECT:** HUGHES CREEK PROJECT  
**DATE:** APRIL 2007  
**CC:** LEMHI COUNTY FOREST RESTORATION GROUP MEMBERS

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**Criteria for Forest Service consideration in preparing Hughes Creek Project**

This memo is intended to provide recommendations from the Lemhi County Forest Restoration Group to the Forest Service as they begin the analysis and prepare a proposed action for the Hughes Creek Restoration Project. Our collaborative group realizes that this is an iterative process, and that as the Forest Service undergoes the analysis process, and develops options for activities and treatments, the group will have additional opportunities to further refine the project.

*The group has reached consensus on the following:*

**Purpose and Need**

*"There is a need to reduce current risk of uncharacteristic wildland fire occurring on National Forest Lands within the Hughes Creek and Gibbonsville area which contains private lands and residences classified as wildland urban interface (WUI). The purpose is to reduce the density of forest vegetation and restore forest stand structure in the dryer sites to more closely reflect historic conditions and to more effectively manage fire occurrence and potential spread within Hughes Creek and into the adjoining Gibbonsville vicinity.*

**Project Priorities**

The group understands that the proposed project will be shaped largely by availability of appropriated funds and revenue generated by commercial activity. With such considerations in mind, the group has prioritized project objectives as follows:

***Tier 1 priorities*** (the group highly recommends that these actions occur)

1. Establish fire resistant zone immediately around homes, private property, travel routes and other community values.
2. Modify fuel loads to restore ecological structure and functions, especially in regard to frequent fire regime. Establish strategic fuel breaks for community and firefighter safety.
3. Minimize catastrophic potential to riparian and old growth areas and help restore ecological function to those areas.

***Tier 2 priorities*** (the group encourages the implementation of these actions if possible)

4. Contain existing weeds and study different weed management techniques, such as pre-treating before a prescribed burn.
5. Identify status of roads and make recommendations for improvements such as replacing the Ditch Ck Bridge or the culvert at the west fork of Hughes Ck.

## **Standards and Methods**

The following were identified as standards that the Lemhi County Forest Restoration Group should apply to every project, including Hughes Creek Phase I:

1. Monitoring and documentation of project results
  - 1.1. Tell the story so successes can be replicated, mistakes avoided
  - 1.2. Specifically highlight wildlife and fisheries habitat enhancements
2. Economic development
  - 2.1. Identify opportunities for material utilization
  - 2.2. Encourage local econ development through utilization and restoration jobs
  - 2.3. Use stewardship contracting and best value contracting tools

The following methods to achieving the desired results for Hughes Creek Phase I include:

1. Mechanical thinning along Hughes Creek and Ditch Creek Roads
2. Commercial harvest in previously managed area to meet forest structure restoration objectives
3. Prescribed burn analysis and consideration throughout an approximately 15,000 acre area understanding that multiple entries may be necessary

## **Zones of Agreement for Hughes Creek Phase I**

1. No commercial harvest in designated old growth areas
2. No new permanent road construction and no road closures
3. Temporary road construction is not desired but might be acceptable if only means to achieving desired project result
4. No commercial harvest in Riparian Habitat Conservation Area
5. Commercial harvest is acceptable in previously managed areas to meet forest structure restoration objectives
6. Mechanical thinning along Hughes Creek and Ditch Creek Roads and other community assets (private property, FS values such as Granite Mtn Lookout) is designed to meet community protection objectives rather than forest structure restoration objectives
7. The Forest Service will analyze the environmental effects using the National Environmental Policy Act process and applicable sections of the Healthy Forest Restoration Act (HFRA), which will include public scoping, the development of an Environmental Assessment, and an objection period. Under HFRA, the Hughes Creek analysis may include only the proposed action and the no action alternatives.

## **Preliminary Project Opportunities**

The following hazardous fuels treatment and associated opportunities have been identified by the Forest Service for this project through conversations with and presentations to the Lemhi Forest Restoration Group:

### ***Road Activities:***

- There would be no construction of new permanent roads associated with this project.
- Existing roads that are currently classified, unclassified, open and closed would be used for access to treatment areas.
- Ditch Creek Road (FS Rd #60089) and Hughes Creek Road (FS Rd #60091) would be the principle haul routes.

- Ditch Creek Road Bridge: Replace existing structure with a concrete box type structure or equivalent with span width accommodating of stream channel.

***Mechanical Treatment Activities:***

- Harvest activities include commercially thinning approximately 3000 acres from below the canopy to reduce to a stand density index (SDI) of 80 {removal of about ½ of understory}. The units would be tractor or cable logged over 3 to 5 years. Precommercial thinning would be conducted in units to achieve ladder fuel reductions. Coordinate activities with companion treatments that may occur on private lands.
- Tree tops and limbs would primarily be lopped, scattered and left in units for subsequent underburning where needed. Treatment units would be designed to provide a pilot-scale opportunity for biomass utilization of slash or non-commercial materials generated or remaining from mechanical fuels reduction treatments.
- The general prescription for primary ingress/egress road segments of Hughes Creek Road and Ditch Creek Road includes treatment within a 400 foot strip on either side of these roads except where private land or other mechanical treatments are present.
- Fuels reduction along these road corridors and associated riparian zones: Utilize hand felling of ladder fuels, select conifers and brush pocket thinning with hand piling of slash for biomass use or pile burning. Coordinate activities with companion treatments that may occur on private lands.
- No commercial harvest within Riparian Habitat Conservation Areas.

***Prescribed Burning Activities:***

- Approximately 12,000 acres would be prescribed burned. The fuels treatment would include broad scale underburning in harvest units and other locations to reduce the concentration of natural surface fuels and activity generated slash from commercial logging, precommercial and hand thinning. Select pile burning would occur where hand or machine piles remained following treatment and alternate biomass utilization. Explore underburning in old growth designated stands on the north side of Hughes Creek where it can be demonstrated that activities would maintain or enhance old growth characteristics.
- The prescribed burning phase should be completed within 10 to 15 years following the mechanical treatment phase. Burning would generally occur during spring and fall seasons. Coordinate activities with companion treatments that may occur on private lands.

***Noxious Weeds:***

- Weeds treatment would include standard prevention activities (Best Management Practices) and programmatic treatments accomplished as part of the Forest annual invasive species program management. Establish a limited scale experimental treatment program tied to prescribed burn activities and include third party monitoring under partnership arrangement. Utilize funding opportunities created by stewardship contracting to accomplish additional acres of integrated weed treatment with priority targeting of new species infestations. Coordinate fuels reduction activities to compliment existing weed treatments, bio-control releases and special grant-funded control actions.

We appreciate the opportunity to collaborate with the Salmon-Challis National Forest on this important project and look forward to continue working together as this project advances.

If you have any questions regarding this memo, please don't hesitate to contact me at 756-1686.

Sincerely,

Gina Knudson  
Executive Director, Salmon Valley Stewardship  
Coordinator, Lemhi County Forest Restoration Group

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**MEMO**

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**TO:** WILLIAM WOOD, SALMON-CHALLIS NATIONAL FOREST SUPERVISOR  
**FROM:** SALMON VALLEY STEWARDSHIP  
**SUBJECT:** HUGHES CREEK PROJECT IMPLEMENTATION PHASE  
**DATE:** 2/24/2009  
**CC:** LEMHI COUNTY FOREST RESTORATION GROUP MEMBERS

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**Request for Collaborative Involvement in Implementation and Monitoring Stages  
of Hughes Creek Project**

This memo is a formal request from the Lemhi County Forest Restoration Group (LCFRG) to the Salmon-Challis National Forest (SCNF) as they move from the environmental analysis stage of the Hughes Creek Hazardous Fuels Reduction Project to implementation and monitoring of the project. In our initial recommendation memo of April 2007, the group outlined the following standards and methods they aspired to apply to all collaborative projects. Those were detailed as:

1. **Monitoring and documentation of project results**
  - 1.1. Tell the story so successes can be replicated, mistakes avoided
  - 1.2. Specifically highlight wildlife and fisheries habitat enhancements
2. **Economic development**
  - 2.1. Identify opportunities for material utilization
  - 2.2. Encourage local econ development through utilization and restoration jobs
  - 2.3. Use stewardship contracting and best value contracting tools

Some specific actions that should now happen to support those objectives include:

**Public Relations.** The SCNF should work together with the LCFRG to develop a public relations plan that would include a joint press release, a briefing package for key decision makers, and field tours. LCFRG members commit to sharing the information with their respective constituents.

**Stewardship Contracting.** The SCNF and should include the LCFRG in the design of the Hughes Creek stewardship contract. There are a number of ways a collaborative group can be involved during this stage of the process including determination of what kind of work the contract will accomplish and which factors should be considered when proposals are evaluated. Involving the collaborative group in developing the contract can help ensure that a broad range of community needs are addressed, including identifying what constitutes “local economic benefit.”

A joint committee should develop the technical proposal requirements and help determine proposal evaluation ranking and weighting factors. Forest Service Handbook 2409.19 Chapter 60 establishes procedures for contractors and others to be involved with some of the contract

development stage without entering into an arena of providing unfair advantage to participating contractors. Once the contract has been developed, the collaborative group as a whole will confirm that the contract reflects the intention of the NEPA document.

**Monitoring.** Involving the collaborative group in project implementation monitoring is a good way to ensure that the project is meeting its objectives. The LCFRG has formed a Hughes Creek multiparty monitoring committee and has taken preliminary steps to collect baseline data before the project is implemented. Once implementation begins, this same team can continue to participate by gathering data, evaluating the results, and presenting their findings and recommendations to the Forest Service and the larger collaborative group. The SCNF should work to ensure monitoring efforts complement those of the LCFRG and results and resources are shared. Funding for project monitoring should be pursued by both SCNF and LCFRG once the final multiparty monitoring plan is adopted.

We appreciate the opportunity to collaborate with the Salmon-Challis National Forest on this important project and look forward to continue working together as this project advances.

If you have any questions regarding this memo, please don't hesitate to contact me at 756-1686.

Sincerely,

GINA KNUDSON

Executive Director, Salmon Valley Stewardship  
Coordinator, Lemhi County Forest Restoration Group

**MEMORANDUM OF UNDERSTANDING**

**between**

**U.S. FOREST SERVICE, SALMON-CHALLIS NATIONAL FOREST**

**and the**

**LEMHI COUNTY FOREST RESTORATION GROUP**

This **MEMORANDUM OF UNDERSTANDING (MOU)** is hereby entered into by and between the U.S. Forest Service, Salmon-Challis National Forest, hereinafter referred to as the U.S. Forest Service, and the Lemhi County Forest Restoration Group, hereinafter referred to as the LCFRG.

**A. PURPOSE:**

The purpose of this MOU is to document the cooperation between the parties and to facilitate community-based collaborative processes for forest health restoration activities on the Salmon-Challis National Forest between the U.S. Forest Service, and the LCFRG. Further purposes of this MOU are to foster trust, clarify roles, and assist in achieving shared community, economic and forest health objectives in a timely manner on the Salmon-Challis National Forest.

The parties, will work together consistent with the National Environmental Policy Act (NEPA) process to establish expectations for landscape-scale restoration and on such products as proposed action, alternatives, collection and use of data, and development of monitoring and adaptive management processes, subject to/consistent with applicable federal laws, regulations, land management plans, and other management direction and in accordance with the following provisions.

**B. STATEMENT OF MUTUAL BENEFIT AND INTERESTS:**

The U.S. Forest Service is a leader in natural resource management and strives to sustain the health, diversity and productivity of U.S. Forest Service lands to meet the needs of present and future generations.

It is guided by a long-term, strategic plan that includes seven major goals: (1) restore, sustain and enhance the nation's forests and grasslands; (2) provide and sustain benefits to the American people; (3) conserve open space; (4) sustain and enhance outdoor recreation opportunities; (5) maintain basic management capabilities; (6) engage urban America with U.S. Forest Service programs; and (7) provide science-based applications and tools for sustainable natural resources

management. Management of the Salmon-Challis National Forest is guided by Land Management Plans that guide all natural resource management activities and establish management standards for lands administered by the Salmon-Challis National Forest.

The U.S. Forest Service is dedicated to quality land management that provides and sustains benefits to the American people, and to collaborating with interested stakeholders in the development, implementation and monitoring of these land management activities.

The LCFRG is a self-formed and self-governed group with representation from diverse entities in the community, such as, but not limited to, timber industry representatives, environmental organizations, recreational interests, the general public, landowners, non-federal government entities, and other community leaders. The LCFRG is dedicated to enhancing the forest ecosystems within Central Idaho, including the Salmon-Challis National Forest. As such, the LCFRG recognizes the broad public interest in and the benefit from forest restoration and hazardous fuels reduction activities, including monitoring and adaptive management of restoration forestry and consensus-building approaches.

The LCFRG works collaboratively across a diversity of stakeholders with an interest in restoration of forest ecosystem health, hazardous fuels reduction, and economic development. All members are required to abide by the LCFRG group structure and act in good faith to understand and help meet the interests and needs of all members. Through this collaboration, and by working with the U.S. Forest Service, the LCFRG has available the expertise and resources of multiple partners. All LCFRG meetings are open to the public. This cooperation serves the mutual interest of the parties and the public.

**IN CONSIDERATION OF THE ABOVE PREMISES, THE PARTIES AGREE AS FOLLOWS:**

**C. THE LCFRG SHALL:**

1. In cooperation with the U.S. Forest Service, examine the current ecological conditions on jointly selected landscapes and work with the U.S. Forest Service to facilitate broad community discussions which include public participation in the development of desired future conditions.
2. Work with the U.S. Forest Service to develop prescriptions for forest health restoration on selected landscapes and help to develop proposed actions.
3. Work with the U.S. Forest Service to facilitate public involvement and understanding throughout the project development and implementation processes.
4. Work with the U.S. Forest Service to provide public education and information for collaborative projects.



5. Solicit broader community-based representation in order to foster discussions of economic, environmental and social implications.
6. Provide the U.S. Forest Service with a written statement articulating the level of support the LCFRG has for a project(s) prior to the U.S. Forest Service signing the decision document.
7. Develop consensus-based recommendations that are intended to inform and build agreement on the purpose and need, alternatives, collection and use of data, impact analysis, development of a preferred alternative, and/or recommendations regarding mitigation of environmental impacts.
8. Provide input to the U.S. Forest Service in a timely manner that promotes efficient NEPA and implementation timelines.
9. Work efficiently to meet jointly developed commitments and timelines.
10. Support consensus-based recommendations in the face of external challenges.
11. Actively participate in and assist the U.S. Forest Service with public meetings to encourage engagement by stakeholders and the public.
12. Direct and track additional resources (in-kind support, contributions, appropriations, etc.) to landscape-scale forest restoration accomplished within collaborative projects
13. Provide public information regarding collaborative meetings with the U.S. Forest Service via member websites, press releases or other measures.

**D. THE U.S. FOREST SERVICE SHALL:**

1. Utilize the LCFRG input and proposals to the maximum extent possible, consistent with legal requirements and responsibility. The U.S. Forest Service will appropriately involve LCFRG where involvement would be necessary or of benefit to the process. The U.S. Forest Service will ensure that input from the LCFRG is appropriately considered and incorporated in management decisions.
2. Make all decisions or determinations for National Forest System lands.
3. In cooperation with the LCFRG, examine the current ecological conditions on jointly selected landscapes and work with the LCFRG to facilitate broad community discussions which include public participation in the development of desired future conditions
4. Comply with NEPA and all other applicable federal laws and the Salmon-Challis National Forest Land Management Plan. The U.S. Forest Service retains sole responsibility for making decisions pursuant to NEPA.
5. Work directly with LCFRG at all phases of the NEPA process, seeking input and agreement on: the purpose and need statement, alternatives, collection and use of data, impact analysis, development of preferred alternatives, and/or recommendations regarding mitigation of environmental impacts (Council on Environmental Quality Handbook (CEQ), p. 13).

6. Engage the LCFRG during selected NEPA processes and make good faith efforts to meet jointly developed commitments and timelines.
7. Work with the LCFRG using adaptive management to implement forest restoration, hazardous fuel reduction and silvicultural treatments to test, develop, monitor and demonstrate effective management techniques.
8. Consider all allowable contract authorities and requirements, with emphasis on long-term stewardship contracts/agreements or other instruments that maximize the value to the local community.
9. Communicate to the LCFRG and the general public agency decisions that are pending, along with associated timelines, as soon as possible.
10. Participate as an ex-officio member in LCFRG meetings. Assist with planning field trips and meetings, providing appropriate resource specialists and materials as needed to educate the LCFRG and the public.
11. Involve and notify the LCFRG when updating out year project plans (i.e. 5 Year Fuels and Timber Plan and quarterly NEPA schedules), and the Salmon-Challis National Forest priority project lists.

**E. IT IS MUTUALLY UNDERSTOOD AND AGREED BY AND BETWEEN THE PARTIES THAT:**

1. The LCFRG is inclusive; new members may join at any time, and the public at large has the same rights and opportunities for access to information and input into LCFRG's processes whether a member or not of the LCFRG.
2. The U.S. Forest Service and LCFRG will work together through all phases of the NEPA process potentially including the framing of the issues, the development of a range of reasonable alternatives, the analysis of impacts, and the identification of the preferred alternative up to, but not including, the agency's final decisions made by the relevant Line Officer (CEQ Handbook, p. 13).
3. Once the U.S. Forest Service formally initiates the NEPA process, specific timelines for advancing that analysis will be established. The LCFRG will provide input to the U.S. Forest Service in accordance to these timelines in order to be considered.
4. The U.S. Forest Service and the LCFRG will work together to develop, discuss, evaluate, and implement innovative landscape-scale planning, project preparation, treatment, science integration, monitoring and adaptive management strategies.
5. The U.S. Forest Service and the LCFRG shall appoint contact persons during each annual meeting in order to facilitate efficient communication.

6. The U.S. Forest Service and the LCFRG will work together to explore implementation mechanisms and processes such as: utilization and contracting strategies, grants and agreements, and use of volunteers.
7. LCFRG and the U.S. Forest Service will use a handover memo to identify roles and responsibilities of collaborative participants and ensure continuity of participation when a personnel transition occurs. Example attached in Attachment A.
8. The Principal Contacts for this instrument are:

**U.S. Forest Service Contacts**

Frank Guzman, Supervisor  
 Salmon-Challis National Forest  
 1206 S. Challis Street  
 Salmon, ID 83467  
 Phone: 208.756.5100  
 FAX:  
 E-Mail: fguzman@fs.fed.us

**LCFRG Contacts**

Gina Knudson, Coordinator  
 Salmon Valley Stewardship  
 513 Main Street  
 Salmon, ID 83467  
 Phone: 208.756.1686  
 FAX: 208.756.1686  
 E-Mail: salmonvalley@centurytel.net

Trinity Bugger, G&A Specialist  
 R1/R4 Acquisition Team, IDAWY  
 Zone  
 1405 Hollipark Drive  
 Idaho Falls, ID 83401  
 Phone: 208-557-5834  
 FAX: 208-557-5829  
 Email: trinitybugger@fs.fed.us

9. Nothing in this MOU shall obligate either the U.S. Forest Service or LCFRG to obligate or transfer any funds. Specific work projects or activities that involve the transfer of funds, services, or property among the various agencies and offices of the U.S. Forest Service and

LCFRG will require execution of separate agreements and be contingent upon the availability of appropriated funds. Such activities must be independently authorized by appropriate statutory authority. This MOU does not provide such authority. Negotiation, execution, and administration of each such agreement must comply with all applicable statutes and regulations.

10. This MOU is not intended to, and does not create, any right, benefit, or trust responsibility, substantive or procedural, enforceable at law or equity, by a party against the United States, its agencies, its officers, or any person.

**F. NON-LIABILITY.** The U.S. Forest Service does not assume liability for any third party claims for damages arising out of this award.

**G. NOTICES.** Any notice given by the U.S. Forest Service or LCFRG will be sufficient only if in writing and delivered in person, mailed, or transmitted electronically by e-mail or fax, as follows:

To the U.S. Forest Service Program Manager, at the address specified in the grant.

To LCFRG, at LCFRG's address shown in the grant or such other address designated within the grant.

**H. PARTICIPATION IN SIMILAR ACTIVITIES.** This agreement in no way restricts the U.S. Forest Service or LCFRG from participating in similar activities with other public or private agencies, organizations, and individuals.

**I. ENDORSEMENT.** Any of LCFRG contributions made under this agreement do not by direct reference or implication convey U.S. Forest Service endorsement of LCFRG's products or activities.

**J. USE OF U.S. FOREST SERVICE INSIGNIA.** In order for LCFRG to use the U.S. Forest Service insignia on any published media, such as a webpage, printed publication, or audiovisual production, permission must be granted from the U.S. Forest Service's Office of Communications. A written request must be submitted and approval granted in writing by the Office of Communications (Washington Office) prior to use of the insignia.

**K. MEMBERS OF U.S. CONGRESS.** Pursuant to 41 U.S.C. 22, no United States member of, or United States delegate to, Congress shall be admitted to any share or part of this agreement, or benefits that may arise therefrom, either directly or indirectly.

**L. FREEDOM OF INFORMATION ACT (FOIA).** Public access to agreement records must not be limited, except when such records must be kept confidential and would have been exempted from disclosure pursuant to Freedom of Information regulations (5 U.S.C. 552).

**M. TEXT MESSAGING WHILE DRIVING.** In accordance with Executive Order (EO) 13513, "Federal Leadership on Reducing Text Messaging While Driving," any and all text messaging by Federal employees is banned: a) while driving a Government owned vehicle (GOV) or driving a privately owned vehicle (POV) while on official Government business; or b) using any electronic equipment supplied by the Government when driving any vehicle at any time. All recipients and subrecipients are encouraged to adopt and enforce policies that ban text messaging when driving company owned, leased or rented vehicles, POVs or GOVs when driving while on official Government business or when performing any work for or on behalf of the Government.

**N. PUBLIC NOTICES.** It is the U.S. Forest Service's policy to inform the public as fully as possible of its programs and activities. LCFRG is encouraged to give public notice of the receipt of this agreement and, from time to time, to announce progress and accomplishments. Press releases or other public notices should include a statement substantially as follows:

"The Forest Supervisor of the U.S. Forest Service, Department of Agriculture Salmon-Challis National Forest."

LCFRG may call on the U.S. Forest Service's Office of Communication for advice regarding public notices. LCFRG is requested to provide copies of notices or announcements to the U.S. Forest Service Program Manager and to the U.S. Forest Service's Office of Communications as far in advance of release as possible.

**O. TERMINATION.** Any of the parties, in writing, may terminate this MOU in whole, or in part, at any time before the date of expiration.

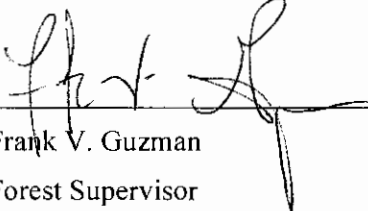
**P. DEBARMENT AND SUSPENSION.** LCFRG shall immediately inform the U.S. Forest Service if they or any of their principals are presently excluded, debarred, or suspended from entering into covered transactions with the federal government according to the terms of 2 CFR Part 180. Additionally, should LCFRG or any of their principals receive a transmittal letter or other official Federal notice of debarment or suspension, then they shall notify the U.S. Forest Service without undue delay. This applies whether the exclusion, debarment, or suspension is voluntary or involuntary.

**Q. MODIFICATIONS.** Modifications within the scope of this MOU must be made by mutual consent of the parties, by the issuance of a written modification signed and dated by all properly authorized, signatory officials, prior to any changes being performed. Requests for modification should be made, in writing, at least 30 days prior to implementation of the requested change.

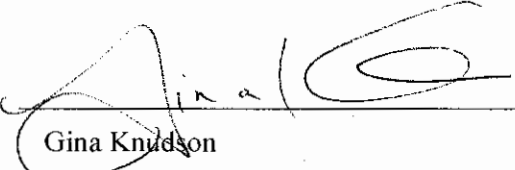
**R. COMMENCEMENT/EXPIRATION DATE.** This MOU is executed as of the date of the last signature and is effective through February 15, 2017 at which time it will expire, unless

extended by an executed modification, signed and dated by all properly authorized, signatory officials.

**S. AUTHORIZED REPRESENTATIVES.** By signature below, each party certifies that the individuals listed in this document as representatives of the individual parties are authorized to act in their respective areas for matters related to this MOU. In witness whereof, the parties hereto have executed this MOU as of the last date written below.

  
\_\_\_\_\_  
Date 02/17/12

Frank V. Guzman  
Forest Supervisor  
Salmon-Challis National Forest

  
\_\_\_\_\_  
Date 02/16/2012

Gina Knudson  
Coordinator, LCFRG  
Director, Salmon Valley Stewardship

The authority and format of this agreement have been reviewed and approved for signature.

  
\_\_\_\_\_  
Date 2/21/2012

TRINITY J. BUGGER  
U.S. Forest Service Grants & Agreements Specialist

# Dinkey Collaborative Charter

## Dinkey Landscape Restoration Project

Adopted April 21, 2011

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### 1. Purpose of the Charter

This charter explains the charge and deliverables; structure; planning and decision-making process; and the procedural guidelines for stakeholders who will work with the Sierra National Forest in planning and implementing the Dinkey Collaborative Forest Landscape Restoration Project. Several documents complement this charter including the Collaborative Forest Landscape Restoration Act, the Dinkey Landscape Restoration Project Proposal and Dinkey Collaborative Landscape Restoration Strategy, USDA General Technical Report PSW-GTR-220 (second printing, March 2009), and the Dinkey Collaborative Schedule of Activities.

### 2. Introduction to the Dinkey Landscape Restoration Project (DLRP)

Congress established the [Collaborative Forest Landscape Restoration Program](#) (CFLRP) under Title IV of the Omnibus Public Land Management Act of 2009. The purpose of the CFLRP is to encourage the collaborative, science-based ecosystem restoration of priority forest landscapes, and per section 4003(b)(3) shall describe plans to

- (A) reduce the risk of uncharacteristic wildfire, including through the use of fire for ecological restoration and maintenance and reestablishing natural fire regimes, where appropriate;
- (B) improve fish and wildlife habitat, including for endangered, threatened, and sensitive species;
- (C) maintain or improve water quality and watershed function;
- (D) prevent, remediate, or control invasions of exotic species;

- (E) maintain, decommission, and rehabilitate roads and trails;
- (F) use woody biomass and small-diameter trees produced from projects implementing the strategy;
- (G) report annually on performance, including through performance measures from the plan entitled the '10 year Comprehensive Strategy Implementation Plan' and dated December 2006; and
- (H) take into account any applicable community wildfire protection plan.

Additionally, per section 4003(b)(1)(D) the CFLRP shall fully maintain, or contribute toward the restoration of, the structure and composition of old growth stands according to the pre-fire suppression old growth conditions characteristic of the forest type, taking into account the contribution of the stand to landscape fire adaptation and watershed health and retaining the large trees contributing to old growth structure.

Additionally, per section 4003(b)(7) the CFLRP shall benefit local economies by providing local employment or training opportunities through contracts, grants, or agreements for restoration planning, design, implementation, or monitoring.

The Collaborative may choose to further define terms as necessary during the course of planning, including possibly developing a glossary.

The Dinkey Landscape Restoration Project (DLRP) is a science-based ecological restoration strategy that covers 154,000 acres in the southern Sierra Nevada within Fresno County, California, including 130,000 acres on the Sierra National Forest and 20,000 acres of Southern California Edison private land. The strategy is both a landscape- and stand-level approach that recognizes that fire is the dominant ecological process influencing ecosystem processes and vegetation dynamics. Coniferous forests, foothill hardwood forests, chaparral vegetation, montane meadows and riparian forests create one integrated landscape. The DLRP aims to create resilient ecosystems and enhance the ability to adapt to wildfire. Consistent with CFLRP, the Dinkey project will increase economic diversification and long-term contracts that can contribute to lower costs associated with small tree removal. It will promote fire resilience, public and firefighter safety, key habitat for sensitive species, proper watershed function, healthy ecosystem processes, and landscape diversity. The Sierra National Forest will work with a stakeholder-based Dinkey Collaborative to implement the DLRP.

### 3. Vision for the Dinkey Forest Landscape

The greater Dinkey community, including California Native American Tribes and youth, will work together with Sierra National Forest to implement, monitor, and adjust a suite of ecological restoration activities. Through the open and transparent collaboration among a dedicated group of diverse members, and using the best-available science, the Dinkey Collaborative will make steady progress toward achieving the following goals by employing a wide variety of ecological restoration tools.

- Restoring and maintaining ecosystems adapted to fire
- Reestablishing natural fire regimes
- Promoting ecosystem diversity and landscape integrity
- Maintaining viable populations of the full complement of fish and wildlife



- Ensuring habitat connectivity
- Protecting fundamental ecosystem and watershed functions
- Increasing ecosystem resilience to stressors, which can include either a deficit or over-abundance of stand mortality and snag creation from insects and disease, and includes human-caused stressors (e.g., invasive species, habitat fragmentation, altered/suppressed disturbance regimes, air and water pollution), and
- Increasing the ability of ecosystems, habitats, or species to accommodate or cope with climate change impacts with minimal disruptions.

These efforts will benefit the landscape and its non-human residents, as well as provide the following benefits to local rural communities and people throughout California:

- Minimizing wildfire management costs
- Providing opportunities to recreate and enjoy nature
- Supplying clean and plentiful water
- Protecting cultural and sacred resources
- Offering meaningful and viable employment opportunities
- Contributing to the sustainable supply of woody biomass and small-diameter trees removed in ecological restoration treatments
- Supporting a viable tourism industry
- Safeguarding public health and safety, and air quality
- Providing public, management, and emergency access using an affordable and environmentally sustainable system of roads
- Benefitting small businesses and economies, and
- Sustaining local cultures.

#### **4. Deliverables and the Corresponding Charge to the Dinkey Collaborative**

The Sierra National Forest is required to develop and gain approval from the Regional Forester for a work plan to implement the project, and corresponding budget by April 2011. The Sierra National Forest is also required to establish a multi-party monitoring program to provide a way for interested parties to collect, analyze, and share information together that advances the underlying goals of the proposed ecosystem restoration. Lastly, the Regional Forester is required to prepare an annual report on the project accomplishments.

SNF has convened a stakeholder-based Dinkey Collaborative to complete the following tasks:

- Develop the annual implementation work plan and business plan for the DLRP, including staffing needs and mechanisms for tracking expenditures;
- Develop site-specific restoration plans, including an assessment of sensitive species needs, fuel conditions, and ecological processes;
- Develop necessary environmental documentation;

- Develop corresponding monitoring programs and budgets, including the collection of baseline data, performance measures, and annual monitoring report;
- Oversee the scientific review of proposed restoration plans and monitoring programs;
- Jointly carry out beneficial restoration activities, using monitoring information to inform efforts;
- Discuss and reach agreement on additional restoration decisions that emerge.

## 5. Collaborative Planning

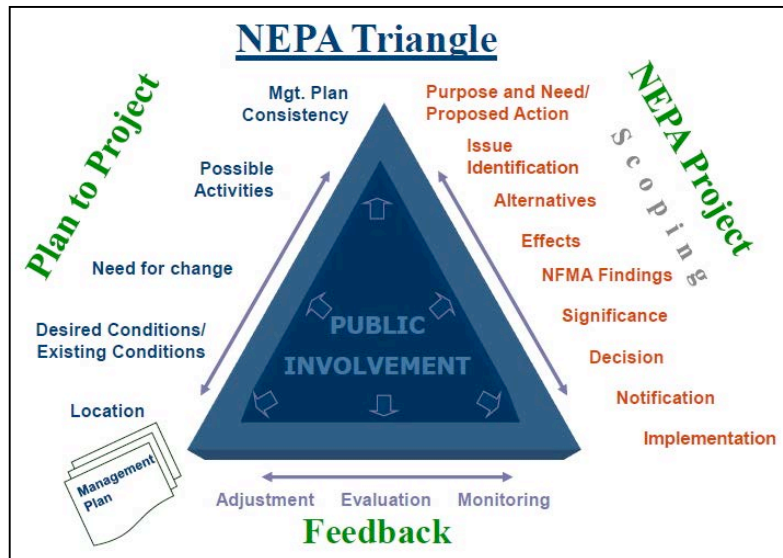
The process outlined below builds upon the process used in the Dinkey North and South Projects, the NEPA process triangle, and joint fact finding best practices. The Dinkey Collaborative will adhere to the following planning process, with the exception of the Soaproot and Eastfork (and Snowy Patterson, if the group chooses to advance this project for implementation in 2012) projects. The process that will be used to develop these projects is described below in the section titled “Transition to Collaborative Planning.”

### Planning

- Dinkey Collaborative confers on annual planning goals and objectives for overall strategy and NEPA and monitoring schedule. In subsequent years, Collaborative integrates monitoring into annual goal setting.
- Dinkey Collaborative continues to involve Pacific fisher scientists, authors from the *Ecosystem Management Strategy General Technical Report*, the *Pacific Southwest Region Ecology Program*, and other scientists, as appropriate, to advise on project development and recommendations.
- Dinkey Collaborative works with Forest technical staff to develop specific proposals for projects, including desired conditions and proposed actions to achieve strategy goals and objectives through the consensus process.
- Technical advisors review key ecological information, conduct surveys when necessary, and provide recommendations on proposed actions.
- Dinkey Collaborative issues its recommendations on the project(s).
- Forest Service decides on final desired conditions and proposed actions to proceed to NEPA.

### NEPA

- Projects move into public scoping process, and Forest Service develops appropriate NEPA document.
- Collaborative members can also engage in the traditional NEPA processes, submitting comments and attending meetings.



### Transition to Collaborative Planning

As described above, the scoping process of NEPA typically would be initiated following the development of specific proposal by the collaborative and Forest Technical staff, review and recommendation by technical advisors, and recommendation from the Collaborative of the project (s). For the Soaproot and Eastfork projects (and Snowy Patterson, if the group chooses to advance this project for implementation in 2012), the process will differ as follows:

- The Forest Service develops sufficient information about the Proposed Action to satisfy the requirements of NEPA for a scoping notice and circulates this to the collaborative for review.
- It is understood among all parties that the level of detail that satisfies the scoping notice is less than that which would be provided to the Collaborative for future projects.
- The Collaborative (or its technical working group) reviews these documents in one or two work sessions and provides feedback and recommendations to the Forest Service.
- The Forest Service revises the documents and releases them for public review through a public notice to initiate scoping.
- During the scoping period and beyond, the Collaborative works with Forest technical staff to refine the proposed actions for these projects, including detailed desired conditions, to achieve strategy goals and objectives through the consensus process.
- Technical advisors review key ecological information, conduct surveys when necessary, and provide recommendations on the detailed proposed actions for these projects.

- During the period between the initiation of NEPA and the beginning of effects analysis, the Collaborative issues to the Forest Service its recommendations on the Soaproot and Eastfork (and possibly Snowy Patterson) projects which may be in the form of management practices that could be added to the initial proposed action or alternatives to the original proposed actions.
- The Forest Service develops an appropriate NEPA document for the Soaproot and Eastfork (and possibly Snowy Patterson) projects.
- Collaborative members can also engage in the traditional NEPA processes, submitting comments and attending meetings on the Soaproot and Eastfork projects.

The following sections on Multi-Party Monitoring, Joint Fact Finding, and Reporting remain unchanged for the Soaproot and Eastfork (and Snowy Patterson, if the group chooses to advance this project for implementation in 2012) projects.

### **Multi-Party Monitoring**

- Dinkey Collaborative helps to develop monitoring plans, which include performance measures for assessing the positive or negative ecological, social, and economic effects of implemented projects, as well as budgeting.<sup>1</sup> The Collaborative may choose to create a sub-committee to work on design (objectives, species, methods, etc.), implementation, and analysis details.
- Monitoring occurs with stakeholder involvement.
- Technical advisors summarize monitoring and/or survey information.
- Dinkey Collaborative meets annually with monitoring program staff to learn about the information developed and latest scientific interpretations and analyses.
- As part of Planning, Dinkey Collaborative revisits stand-level desired conditions and develops proposed action based on previous years' monitoring.
- SNF and Dinkey Collaborative co-host an independent science panel in 2015 and 2020 to interpret trends and adapt restoration efforts as needed.

### **Joint Fact Finding: Using Scientific Information to Inform Decision-Making**

Joint fact finding references best practices for stakeholders to engage with scientific experts to frame research questions, interpret research results and resolve technical or policy issues.<sup>2</sup> The Collaborative will employ a

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<sup>1</sup> This language is from the Act.

<sup>2</sup> Ehrman JR, Stinson BL (1999) Joint Fact-Finding and the Use of Technical Experts. In: Susskind L, McKernan S, Thomas-Larmer J (eds) *The Consensus Building Handbook*, Sage Publications Thousand Oaks, CA. Karl HA, Susskind LE, Wallace KH (2007) A Dialogue, not a Diatribe: Effective Integration of Science and Policy through Joint Fact Finding. *Env* 49(1): 20-34.

joint fact-finding process in reviewing and using scientific information to inform its decision-making. When an issue emerges that merits scientific inquiry and discussion, the Collaborative will use this protocol.

### **Procedure**

1. The facilitator or a member develops a short written Issue Paper identifying the key issues and questions in enough detail to communicate clear understanding of the concern. The Collaborative reviews this in short order, and the author makes any necessary revisions.
2. The Collaborative group organizes a technical advisory group (TAG) consistent with its charter to address the Issue Paper. The TAG can include members of the Collaborative, outside experts, or some combination of both. The Collaborative group or TAG will identify additional experts needed to supplement existing expertise, reach an informed outcome and promote understanding and resolution.
3. The Collaborative and TAG will identify relevant research for TAG participants to review in preparation for the first TAG meeting.
4. During the first TAG meeting, the TAG discusses relevant research papers gathered on the topic, analyzing existing information and knowledge gaps related to the Issue Paper. Member(s) raising issue makes recommendation to resolve issue given scientific review and responsive to other stakeholder interests.
5. The TAG considers suggested resolution and develops written recommendation for the Collaborative's consideration. If the TAG determines that it needs to gather more information to reach a recommendation on the Issue Paper, the TAG will schedule a subsequent meeting, considering the Collaborative schedule of activities, and inform the Collaborative either at a meeting or via regular project correspondence. At the subsequent TAG meeting, the TAG considers the new information and develops a recommendation, consistent with the Collaborative group's decision making, noting areas of agreement and any disagreement.
6. Two TAG members present its findings to the full Collaborative, answers both substantive and procedural questions, and advise the Collaborative as to its recommendations.
7. The Collaborative seeks consensus on what recommendations to adopt and whether to conduct further fact-finding, and makes a decision according to its standard decision-making process, including the documentation of differing perspectives.
8. The final outcome is recorded in the Issue Paper and documented on the website.
9. When the SNF takes action, this will also be included in the Issue Paper and circulated and posted.

### **Reporting**

As required by the Collaborative Forest Landscape Restoration Act, the Sierra National Forest is to submit an Annual Report, Work Plan, and Business Plan, with quantitative assessments of strategy implementation. As listed in its schedule of activities, the Dinkey Collaborative will receive briefings on these documents, will have the opportunity to review drafts, and will receive final versions of the documents. The Collaborative will also be invited to provide draft language and material for the documents. Dinkey Collaborative member(s) can attend the FLRA online support meetings to track and access national information on FLRA implementation.

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## 6. Compliance with the Federal Advisory Committee Act

PL 111-11, the Omnibus Public Land Management Act of 2009, provides the basis for the Collaborative Forest Landscape Restoration Projects. This authorizes the U.S. Forest Service to convene a collaborative group for the purpose of project development. Specifically, it authorizes that such a group

- (2) be developed and implemented through a collaborative process that
- (A) includes multiple interested persons representing diverse interests; and
  - (B) (i) is transparent and nonexclusive; or
    - (ii) meets the requirements for a resource advisory committee under subsections (c) through (f) of section 205 of Public Law 106-393 (16 U.S.C. 500 note);

The Federal Advisory Committee Act ensures that advice by various advisory committees formed over the years is objective and accessible to the public. To that end, the Forest Service will publicly notice Collaborative meetings. And, all meetings will be open to the public and provide time for public comment.

## 7. Membership

The Dinkey Collaborative will include representatives of interest groups engaged in Sierra National Forest public lands management that represent a range of viewpoints. These include but are not limited to the following:

- Air Quality
- Community Vitality and Local Economic Development
- Ecology and Wildlife
- Fire Safety and Community Protection
- Forestry
- Governmental: Community, County, State, Federal and Tribal
- Industry (including Biomass Processing)
- Landowners
- Youth Education and Training

The Dinkey Collaborative will include representatives of California Native American Tribes in the project area. The Collaborative will also include representatives of public agencies that share responsibility for stewardship of public lands in California, including the U.S. Forest Service (Sierra National Forest), U.S. Bureau of Land Management, Sierra Resource Conservation District, California Department of Fish and Game, and local government.

**New Members:** While membership is open, individual or groups must formally commit to uphold the spirit and guidelines of the charter by signing the charter. The Collaborative aims for members to make informed decisions. New members must therefore commit to understanding the information being analyzed and previous Collaborative discussions to participate in decision-making.

**Attendance Requirements:** Members in good standing must attend at least four meetings per calendar year or send an alternate. Members who are unable to meet attendance requirements will be deemed “inactive” and will not be consulted in their absence before decisions are finalized. The facilitator will record attendance at each meeting.

**Alternates:** To promote problem solving and continuity of discussions, members are encouraged to participate in meetings as much as possible. When unable to attend, the member may choose to send an alternate and notify the FS Program Manager and Facilitator. However, the member must brief the alternate with regards to previous discussions and agenda items so the alternate is informed enough to participate. Lastly, alternates will be asked to defer to the group if introducing a topic of discussion that has been discussed or agreed to previously in the alternate's absence. In this case, the facilitator will ask the alternate to consult with members on the break to learn more about the topic of interest.

## 8. Roles and Responsibilities

**Executive Sponsor:** Forest Supervisor Scott Armentrout serves as a resource for policy guidance on an as-needed basis for development and completion of the Dinkey Collaborative deliverables.

**Dinkey Collaborative Members:** Members (1) advise SNF staff on how issues might best be addressed and documents improved; (2) contribute expertise, data and information to clarify discussions, eliminate false assumptions, and advance innovation; (3) serve as the liaison to communicate information to and from their organizations and constituencies; and (4) act in a manner that will enhance trust among all partners and interested parties. Members are responsible for reviewing material in advance and being prepared to engage in substantive discussions during meetings. Members should attempt to attend every meeting to ensure continuity in discussions and decisions, and to ensure efficient work flow (rather than repeating conversations, revisiting previous decisions, etc).

**U.S. Forest Service Program Manager:** Serves as the programmatic staff of the Dinkey Collaborative. Responsible for executing the Dinkey Collaborative Charter. Responsible for ensuring that all relevant perspectives related to the Deliverables are discussed and captured in written documents. Responsible for providing meeting materials at least one week in advance and maintaining the public website. Responsible for making technical information available to members sufficiently far in advance for meaningful review and engagement. Responsible for overall project management and liaising with technical support. Responsible for making final decisions regarding the structure and content of the deliverables (the work plan, management plans, scientific reviews, and monitoring plans). Responsible for collaborative implementation of the DLRP.

**Technical Support to the Dinkey Collaborative:** Resource experts who function as technical advisors to the collaborative during ongoing discussions of the Dinkey Collaborative and its work groups. Technical advisors participate in meetings to serve as an important resource to the Collaborative on complex scientific questions and issues.

**U.S. Forest Service Tribal Engagement Support:** Consists of the SNF Tribal Relations Program Manager. The Program Manager hosts a quarterly Tribal forum and will share information about the Dinkey Collaborative's activities with forum participants. The forum may also be used to discuss how to appropriately include confidential information about sacred sites and cultural resources in the Dinkey Collaborative's planning process, including direct government-to-government consultation as needed. The Program Manager will also advise on appropriate strategies for Tribal outreach and engagement.

**Facilitators:** Provides impartial leadership to the dialogue process and meeting management. Staff are content neutral, which means they will not try to promote a particular outcome for the group, but will advocate for a fair, effective, and credible process. Staff will help the Dinkey Collaborative stay within scope and follow the terms of the Charter. Specific duties include: (1) helping to formulate meeting objectives and agendas; (2) overseeing the preparation of meeting notes, including points of agreement and disagreement; (3) serving as a confidant for members who wish to express concerns privately, whether about the substance of discussions or the dialogue process. Facilitation staff will also actively suggest methods to accomplish tasks. The facilitators will support capacity building with all Collaborative members, including interest-based negotiation and aiding the group to facilitating its own meetings.

If a member has a concern about the neutrality or performance of the facilitator, s/he should first speak with the facilitator and then the group. If the concern is unresolved, the member should discuss it with Larry Fisher, Public Lands Program Manager, U.S. Institute for Environmental Conflict Resolution.

## 9. Organizational Structure

### Steering Committee

To advance its work and to use the full Collaborative's time most efficiently, a small Steering Committee (2-5 members plus FS Program Manager and the facilitator) will meet regularly via teleconference to develop meeting agendas and meeting materials and to help manage the Collaborative's work more generally. The Steering Committee will focus on the process. The Steering Committee will not make substantive decisions about policy or management; however, the committee may occasionally provide feedback on proposals to improve them in preparation for a meeting. Members of the Steering Committee will be expected to have the passion, time, and resources needed to regularly and actively contribute to the committee's discussions.

### Work Groups & Technical Advisory Groups

To advance its work, particularly on issues where consensus does not exist and to use the full Collaborative's time most efficiently, the Dinkey Collaborative may choose to create work groups to conduct specific tasks it identifies and technical advisory groups to conduct analyses and provide recommendations on scientific issues. The Collaborative will craft a clear charge and scope of work (in the meeting summary) for any work group or technical advisory group. Work groups and technical advisory group meetings will be open to the public, and their materials made available on the website. Both work groups and technical advisory groups can call on additional experts or stakeholders to inform their work.

Like in the full group, work groups and technical advisory groups will seek consensus in their recommendations and work products. Highlights, decisions, and action items will be recorded in meeting summaries or Issue Papers. In addition to regular progress updates, materials developed in work groups or by technical advisory groups will always be brought back to the full Collaborative for discussion, refinement as necessary, and adoption. Major products will tracked on the full Collaborative's schedule of activities, including dates for review by the full group.



**Voluntary & Balanced Representation:** Collaborative members may volunteer to participate in work groups or technical advisory groups; both will strive for balanced representation of interest groups. To ensure that work groups and technical advisory groups remain small enough to complete tasks expeditiously, collaborative members will caucus and identify appropriate representatives for different interests. All members will be expected to have the passion, time, and resources needed to do intensive work. Technical advisory group members will also be expected to have necessary technical expertise to participate in conversations and follow-up work. Sierra National Forest will provide logistical and technical support to help convene work groups and technical work groups and track their work products.

## 10. Decision-Making within the Dinkey Collaborative

This is an advisory rather than a final decision-making group. In working with the Dinkey Collaborative, the facilitators and technical staff will use a consensus-seeking approach and work diligently to find common ground on issues. To the extent that the Collaborative reaches consensus on recommendations, the final decision maker, the Sierra National Forest is likely to implement the recommendations.

The definition of consensus spans the range from strong support to neutrality, to abstention, to “I can live with it.”

If a stakeholder raises an issue not easily resolved by consensus agreement in the Collaborative group, the Collaborative will defer the issue to an existing or new work group or technical advisory group. The facilitator, program manager or member will write up a description of the key issues in a brief Issue Paper. The work group will discuss and make a tentative recommendation to the Collaborative. All opinions will be included to inform the Collaborative’s decision. The Collaborative will then consider the proposal using this decision-making protocol. The Collaborative may seek clarifying information before it reaches a final outcome. All outcomes will be recorded in the Issue Paper and posted on the web. When the SNF takes action, this will also be noted in the Issue Paper.

If the Collaborative is clearly divided into two or more groups and cannot make further progress toward consensus, more than one option may be recommended for SNF’s consideration, and the facilitator will record differing perspectives in the meeting summary or a briefing document if necessary.

If members cannot attend a meeting where decisions will be made, they will be given an opportunity to review relevant materials, provide comments, and state whether they support the decision in advance of the meeting. Ensuring that decisions consistently reflect balanced representation and are responsive to members input is critical. In situations where members are unable to review materials in advance of a meeting, the Collaborative may note conditional consensus and task the facilitator to verify absent member support.

All decisions, agreements, recommendations, and reservations will be documented in the meeting summaries and specific letters of support, which are part of the public record and will be made available on the project website. This includes the names of those who support or oppose specific decisions, agreements, or recommendations.

**Timeframe:** Through the schedule of activities, the Collaborative will agree to general timelines for decision-making on discussion topics. Facilitators and members, including Forest Service decision makers, will make every effort to reach agreement on discussion topics. However in the absence of agreement and when the given timeframe has elapsed, the Collaborative will formulate its recommendations, consistent with the Collaborative’s decision-making and move to other discussion topics. The schedule of activities will be adopted separately from this Charter; adopting this Charter does not imply approving the schedule.

**Projects Already in NEPA:** As noted in the Roles and Responsibilities (Section 5), SNF is responsible for including Collaborative member input on environmental analyses and making final decisions regarding the structure and content of the DLRP documents. In cases where projects are already in NEPA review before the Collaborative convenes, future documents that describe these projects will note that they were not developed or necessarily endorsed by the Collaborative. Collaborative members always retain their right to comment as individuals on projects in the NEPA process.

## 11. Process Agreements, Meeting Ground Rules, and Media Protocol

### Process Agreements

- **Members agree to act in good faith in all aspects of this process and to communicate their interests.** Members agree to make a concerted effort to provide requested information to other members or to explain the reason why not. Tentative or sensitive information will be treated appropriately.
- **Members agree to address the issues and concerns of the participants.** All members have a stake in the issue at hand. Members agree to validate the issues and concerns of other parties, and work to develop agreements that include all the issues under consideration. Disagreements will be viewed as problems to be solved, rather than battles to be won.
- **Parties will express concerns and support in discussions of the Dinkey Collaborative that are consistent with concerns and support they express in other forums, including in sessions with the press.**
- **Members agree to only make commitments that they intend to keep.**
- **Members can request a caucus with other members of its interest group at any time.** This allows members to consult with other members that share their interests or with constituents outside of the meeting, for the purpose of exploring topics of concern and advancing agreements. Upon request from any caucus the facilitator will attend and consult with the parties during their caucus session.
- **Meeting notes will be prepared with a focus on key points, ideas, and action items rather than as transcripts.** Unless very specific to understanding the content, references will generally be made to the content rather than the members. Meeting notes will be circulated within two weeks of meetings. Meeting notes will then be made publicly available on the public website.

## Meeting Ground Rules

- **Electronic courtesy.** Most of the participants have demanding responsibilities outside of the meeting room. We ask for your attention during the full meeting. Please turn cell phones, or any other communication item with an on/off switch to “silent.” If you do not believe you will be able to participate fully, please discuss your situation with one of the facilitators.
- **Be comfortable.** Please help yourself to refreshments or take personal breaks.
- **Humor is welcome** and important, but humor should never be at someone else's expense.
- **Stay focused on the charge and deliverables.** There are many related topics that people care about. The *Collaborative* cannot address all of these. The facilitator will help the group stay focused on the deliverables.
- **Use common conversational courtesy.** Don't interrupt others. Use appropriate language. Avoid third party discussions.
- **Treat each other with respect.** People are passionate about these issues and in many cases have invested their careers in this work. People offer their time, expertise, insight, and resources in these discussions. Please respect the work that people do to advance the conversation and create common ground.
- **All ideas and points have value.** You may hear something you do not agree with. You are not required to defend or promote your perspective, but you are asked to share it. All ideas have value in this setting. If you believe another approach is better, offer it as a constructive alternative.
- **Avoid editorials.** Please avoid ascribing motives to or judging the actions of others. Please speak about your experiences, concerns, and suggestions.
- **Honor time.** In order to achieve meeting objectives it will be important to follow the time guidelines provided by the facilitator.

## 12. Outreach and Communication

The Dinkey Collaborative will develop a *Communication Plan* for outreach to share outcomes with a broad stakeholder community. The Collaborative will rely on two regional bodies that meet regularly to provide milestone updates:

**Sustainable Forests and Communities Collaborative:** Sponsored by the Sierra Nevada Conservancy, this group is comprised of a diverse range of stakeholders from throughout Madera, Mariposa, and Fresno Counties with a common interest in the ecological, economic and cultural health of the Sierra Nevada. The group meets periodically and involves many stakeholders interested in the DLRP project area. The stated mission is: *The Sustainable Forests and Communities Collaborative initiates,*

*encourages and supports efforts that promote a healthy sociological system of forests, watersheds and economies in the communities of the South Central Sierra through a transparent, collaborative and mutually supportive process within a diverse and committed stakeholder group.*

**Tribal Forum:** The Tribal Forum, organized by Dirk Charley from the Sierra National Forest, meets quarterly. Executive Sponsor Forest Supervisor Scott Armentrout also attends.

**Yosemite Sequoia Resource Conservation and Development Council:** Is a four county quasi-governmental 501(c)3 that is comprised of a diverse range of organizations, Tribal Governments, environmental, special districts and County government including one representative from the Board of Supervisors whose district lays within the Sierra Nevada in Mariposa, Madera, Fresno and Tulare Counties with a common interest in the ecological, economic and cultural health of the Sierra Nevada. The Council meets every other month. Their mission is *“To promote the quality and aesthetic value of our cultural, environmental, and recreational resources by improving the quality of life through diverse, sustainable economic development.”*

**Email List:** A list of interested parties will also be developed to track people and organizations that wish to receive general communication and updates about the Collaborative’s work, but do not want to be involved directly.

**Periodic Updates:** The Collaborative will periodically develop short, high-level summaries or briefing materials about their activities for outreach and communication purposes. The Collaborative may choose to create a Communication Sub-Committee to develop these products.

**Website:** The Collaborative, through the Forest Service, will develop a website to share all materials.

## **Media Protocol**

Outside of meetings and if contacted by the press or an external party, members would:

- Clarify that they are not speaking on behalf of the Dinkey Collaborative.
- Represent comments made in these meetings as organizational or general group comments.
- Avoid personal references or expressing or characterizing the views or statements of others.
- Avoid using the press as a vehicle for negotiation.

Members reserve the right to express their own opinion to the press, but not the opinions of others. Participants can refer media inquiries to group members for individual comments.

The Dinkey Collaborative may periodically develop and approve joint statements to keep the public and media informed of its work, agreements, and progress. Members can speak freely about these joint statements.

### 13. Schedule of Activities and Charter Amendments

The Dinkey Collaborative will convene in December 2010 and is expected to continue while the DLRP continues to be implemented. The Dinkey Collaborative will meet approximately ten times during 2011. The **Science Symposium** will occur in 2015 and 2020.

At the beginning of each calendar year, the Dinkey Collaborative will agree to its schedule of activities.

During the year, the facilitator will work with the Sierra National Forest and the Collaborative to modify the Collaborative's schedule of activities as needed.

At the end of each year, the Collaborative will evaluate its progress toward meeting the DLRP goals and oversee the annual monitoring report. At this time the Dinkey Collaborative may choose to amend this Charter. At the end of every two years, beginning at the end of 2012, the Collaborative will renew its commitment and revisit its membership.

### 14. Signatures for the Charter

Dinkey Collaborative members will use this charter to conduct business and make decisions in planning and implementing the Dinkey Collaborative Forest Landscape Restoration Project.

Dinkey Collaborative members are asked to approve the charter verbally, which will be recorded in the meeting summary. Members are also invited to approve the charter by signing it.

Approving the charter does not imply agreement with specific project or management agreements or recommendations.

The Collaborative will review the list of charter signatories each year to ensure it remains current.

We the undersigned affirm our commitment to the Dinkey Collaborative Charter.


  
\_\_\_\_\_  
Sierra National Forest Supervisor, Date 5/18/2011

  
\_\_\_\_\_  
Name, Date 4-21-11

  
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Name, Date 4/21/11

  
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Name, Date 4-21-11

Pamela Flick 4/21/11  
Name, Date

Mandy Vance 4/21/11  
Name, Date

Patrick Emmert 4/21/11  
Name, Date

Ray Laclergue 4/21/11  
Name, Date

Susan Britting 4-21-11  
Name, Date

Signatures above:

Scott Armentrout, Sierra National Forest Supervisor  
Kent Duysen  
Larry Duysen  
Pamela Flick  
Patrick Emmert  
Susan Britting

Craig Thomas  
Matt Meadows  
Stan van Velsor  
Mandy Vance  
Ray Laclergue

Additional verbal adoptions by members on April 21, 2011:

Rich Bagley  
Shawn Ferreria  
David Konno  
John Mount

Additional adoption by email on May 8, 2011:

Rich Kangas

Additional verbal adoption by telephone call on May 9, 2011:

Chad Hanson

## **Blackfoot Drought Response Plan**

### **Revised April 30, 2010**

#### ***Introduction***

Drought is described as a deficiency of precipitation over an extended period of time, usually a season or more that results in shortages of water. Drought is also a normal, recurrent feature of climate that occurs in most climatic zones.

In 2000, the Blackfoot Drought Committee was formalized to coordinate the development and implementation of a voluntary drought response effort in the Blackfoot watershed. The drought response is intended to minimize the adverse impacts of drought on fisheries resources and to aid in the equitable distribution of water resources during low flow summers.

The Blackfoot Drought Response Plan is based on the premise of “shared sacrifice” with the goal that all Blackfoot water users (agricultural, irrigators, outfitters, anglers, recreational users, government agencies, homeowners associations, businesses, conservation groups, and others) voluntarily agree to take actions that will result in water savings and/or the reduction of stress to fisheries resources during critical low flow periods. This approach was selected for several reasons:

- Drought and the management of low flows are a watershed-wide concern;
- Beneficiaries of the drought response effort include interests throughout the watershed;
- The greater benefit to maintaining river flows and sustaining the overall health of the river can only be gained by the cooperative effort of the larger community.

The Blackfoot Drought Plan falls into a more organized, more conservative river restoration and native fish recovery program than other basins in Montana. The Blackfoot approach offers an alternative to angling restrictions and traditional enforcement of Montana Fish, Wildlife and Parks in-stream flow right, while engaging the stakeholders of the Blackfoot Valley in the protection and future conservation of its fisheries. Under the “shared sacrifice” concept, irrigators, outfitters and recreationists have a unique opportunity to have a positive impact on the future and health of the Blackfoot Watershed.

#### ***Purpose***

The purpose of the Blackfoot Drought Response Plan is to minimize the adverse impacts of drought on fisheries and to aid in the equitable distribution of water resources during low flow summers.

#### ***Areas Covered by the Plan***

This plan covers the Blackfoot River and its tributaries from its headwaters atop the continental divide to its confluence with the Clark Fork River near Bonner, Montana.

### ***The Murphy Right***

Murphy Rights are water rights for in-stream flows created under 1969 legislative authority. Flow evaluations by Montana Fish, Wildlife, and Parks (MT FWP) in the 1960's determined that 700 cubic feet per second (cfs) was the minimal instream flow needed to protect "blue-ribbon" fisheries in the Blackfoot River from severe low flows. These water rights were claimed in the Blackfoot by MT FWP as of January 6, 1971 and were asserted for the reach beginning at the river's mouth upstream to its confluence with the North Fork of the Blackfoot River. This is also known as the Murphy Right Reach.

There are nearly 3,500 water rights of record within the Murphy Right Reach of which 1,270 assert the use of water in excess of 1 cfs. 258 of these water rights are "junior" to the Murphy Right. Although this is a voluntary plan, there are regulatory implications for water users junior to the Murphy Right. As part of this plan, MT FWP has agreed not to initiate a "call for water" under their senior water right (Murphy Right) on junior water users who meaningfully participate in the Blackfoot Drought Response when flows fall below 700 cfs. Junior water users that have not confirmed their participation through the Blackfoot Drought Committee or that do not meaningfully participate in the Blackfoot Drought Response are subject to the Murphy Right "call for water".

### ***Drought: Resource, Social, and Economic Concerns***

Some of the impacts of drought include reduced crop, rangeland, and forest productivity; increased fire hazard; reduced water levels; increased livestock and wildlife mortality; and damage to fish and wildlife habitat. In the Blackfoot, drought has also impacted native fish recovery and management efforts.

The 700 cfs minimal instream flow value is based on the concept of the wetted-riffle (the shallow rapids of streams and rivers). Because of the flat shape of a riffle and low angle of the stream bank (in cross-section), once water pulls away from the bank it recedes across the riffle quickly. This process is accelerated at 700 cfs and below for riffles of the lower Blackfoot River.

Riffles are critical because they produce the chlorophyll (plant life) and forage (insects and small fish) that fuels the upper trophic levels (e. g. larger trout) of the ecosystem. In addition to basic river productivity, riffles provide spawning areas and habitat for juvenile trout and forage-fish alike. Entire communities - species ranging from midge to salmonfly, dace, sculpin and juvenile whitefish live in the cracks and crannies of cobbles that form the riffle. This forage base - the grocery list at the lower end of the food chain - sustains predatory species like trout as well as dependent wildlife in the upper food chain. When the wetted-width of the riffle narrows, river productivity rapidly declines and the forage base that sustains thriving trout fisheries is greatly diminished.

As the habitat base shrinks below minimal flows, it sets in motion a series of complex biological processes. These involve increased competition within fisheries communities for food and space; restricted movements between critical habitats (e.g. spawning sites



and refugia); elevated mortality (at all trophic levels) as prey is concentrated; and cold-water communities become vulnerable to temperature stressors depending on species and location. Juvenile fish are highly vulnerable to habitat loss and related stress and are the first to undergo population-level declines.

As flows decrease, water temperature increases. With elevated water temperature, metabolic rates increase and dissolved oxygen levels decline, pollutants concentrate and fish become more susceptible to pathogens like fungal infections and whirling disease. Although all Blackfoot River trout are cold-water fish, bull trout occupy the coldest waters within the system. Unlike other trout, bulls undergo thermal stress beginning at 60-65°F, above which growth and survival begin to decline. As an obligate cold-water fish, bull trout migrate from the river to cooler tributaries in response to normal summer warming. Unfortunately, many refuge habitats are less than optimal due to riparian alterations and water temperatures of 63-70°F. For other trout species (cutthroat, rainbow and brown trout), temperature stress begins near 70°F with growth and survival at issue between 73-77°F. Depending on location, Blackfoot River temperatures of 70-78°F are common for July-August and place variable levels of stress on the fish.

For those who depend on water and other natural resources for their livelihood, drought can mean the loss of income and jobs. Drought severely limits the amount of water available for crop production and raising livestock. For outfitters and other businesses that depend on visitors to the Blackfoot have to deal with the consequences of declining fish populations and people seeking other areas for fishing and recreational opportunities.

### *Shared Sacrifice*

The 258 water users junior to the Murphy Right cannot by themselves solve the low flow problem. Additionally, while there are major water users within the Murphy Right Reach, the most concentrated use of water lies upstream of this reach or on major tributaries of the river.

The Blackfoot Drought Response Plan is based on meaningful participation from water users junior and senior to the Murphy Right who voluntarily reduce their collective water use during drought periods in order to maintain critical in-stream flows. The plan seeks as a matter of equity to include junior users, senior users, small users, and large users throughout the entire watershed.

Under the Blackfoot Drought Response Plan, water right holders junior and senior to the Murphy Right are asked to voluntarily reduce water consumption when flows reach pre-determined thresholds. The strategy is to create a “water bank account” through pooling of reductions in water usage. Prior to development of the Blackfoot Drought Response Plan, junior water users were required to stop water withdrawals if MT FWP made a “call for water” in enforcing their water right. The Blackfoot Drought Response Plan offers an alternative to traditional enforcement of the Murphy Right by allowing junior water users who voluntarily reduce their water consumption to match their contribution with those provided by senior water right holders who have also place their water savings in the “water bank”.

The Blackfoot Drought Plan is a basin-wide effort. This allows the opportunity to identify and address stream reaches outside of the Murphy Right Reach where small increases in instream flows could provide significant benefits that are less than predictably protected through a formal call for water. Through the basin-wide pooling of water resources, the end goal of maintaining critical in-stream flows during drought periods can be achieved.

Participation by other interests such as fishing outfitters and local residents is also critical to the success of the plan. Drought, low flows, water temperatures and large increases in angling pressure over the past 15 years, and the associated stress to fish, has compounded concerns for native fish recovery in the Blackfoot. Native fish have a high catchability and mortality rate which is why outfitters and anglers are asked to voluntarily limit fishing hours and/or alter angling techniques on the river and critical recovery streams when pre-determined temperature thresholds are reached. By taking these actions, the angling community helps to reduce stress to fish and increase chances of survival during critical low flow periods.

The “shared sacrifice” approach distributes the impacts of drought and low flow management to all water users as opposed to a single group of water users as is the case with many traditional drought management plans. By working together under the Blackfoot Drought Plan, all water users have a unique opportunity to a positive impact on the future and health of the Blackfoot Watershed.

### ***Blackfoot Drought Committee***

The Blackfoot Drought Committee is charged with the oversight and implementation of the Blackfoot Drought Response Plan and is coordinated through the Blackfoot Challenge. Its membership is comprised of local landowners, irrigators, outfitters, state and federal agents, and members of various conservation organizations.

Oversight of the Blackfoot Drought Response Plan is a continuous process that involves monitoring drought indicators, conducting outreach, and implementation. Activities and timing of activities may change throughout the year depending on conditions and needs but in general the following provides a more detailed description of Committee activities throughout the year:

#### **January/February/March**

- The Committee will meet monthly (or more if needed) to monitor drought indicators such as snow pack, precipitation, soil moisture, and the Surface Water Supply Index (SWSI). These indicators help to determine when and whether low flows will occur and ultimately if the Blackfoot Drought Response will be implemented in a given year;
- At least one update (via letter and email) on conditions may be provided to Blackfoot water users during this period.

#### **April/May**

- The Committee will meet monthly (or more if needed) to monitor drought indicators such as snow pack, precipitation, soil moisture, SWSI, and spring runoff;
- At least one update (via letter and email) on conditions is provided to Blackfoot water users during this period;
- If drought is predicted based on monitoring of conditions, the Committee will increase outreach activities. Outreach activities may include notices (letters and email) to water right holders on potential for low flows and need for the Drought Response, notices to outfitters and anglers on the potential for high water temperatures and need for the Drought Response; issuing press releases, posting of flyers, signs, and posters; personal communication with water users, and updating the Blackfoot Challenge hosted “Drought Information” web site. If necessary the Committee may also choose to host a public meeting on drought and the need for cooperation.

### **June/Mid-July**

- Committee meetings will increase (typically to once a week) and monitoring focus will shift to stream flows, precipitation, water temperature, and biotic conditions;
- If drought is predicted based on monitoring of indicators, water users will be contacted and asked to confirm their participation in the drought response;
- Outreach activities (letters, emails, personal communication, posters, signs, press releases, web site) continue and are updated with current information to help water users prepare for and respond to drought

### **Mid July/August/September**

- Drought Plan is implemented as described in the “Drought Plan Implementation” section;

### **October/November/December**

- The Committee will host an annual year end meeting to summarize hydrology, drought plan participation; water conserved, and outreach activities. The Committee will also discuss drought plan related issues and possible changes in approaches to drought management at the annual meeting.

### ***Drought Plan Implementation***

The Blackfoot Drought Plan utilizes flow and temperature triggers to determine when drought response measures are necessary. Flows are the primary indicator of drought conditions and determine when specific actions under the Blackfoot Drought Plan will be implemented. All flow triggers described in this plan are as measured at the USGS gage station (#12340000) near Bonner, Montana. While flows will vary throughout the watershed during the year, this site is generally considered to be representative of conditions upstream with respect to biological processes and river productivity.

Water temperatures can also trigger drought response measures. Depending on the conditions of a given year, water temperature can take precedence over flows with respect to certain drought response measures. Water temperatures can vary greatly throughout the watershed and are monitored at various locations.

The Blackfoot Drought Committee maintains internal rosters of participants and potential participants. For consumptive water users (primarily irrigators), this roster contains the participants name, contact information, and water right data (flow rate, priority date, and water sources). More importantly, the roster contains the participant's drought management plan and an estimate of water conserved. The individual drought management plans have been developed by working with the water user to identify opportunities for water conservation based on individual needs and conditions. Drought management plans vary by participant but common water conservation strategies include pooling water rights and using them in rotation, reducing overall use, reducing instantaneous use, or shutting down. A roster is also maintained for non-consumptive water users (primarily fishing outfitters) which contains names and contact information. These rosters are for Committee use only and are used to track water conserved and quantify success of the Blackfoot Drought Response.

While the Blackfoot Drought Response Plan is active, the Committee will provide assistance to water users in implementing their drought response/management plans. To the extent allowed by the availability of funding and field staff, the Committee will conduct field checks during implementation of the Drought Response and reviews of at least 10 individual drought response plans each year.

### ***Flow & Temperature Triggers***

#### **As flows near the 700 cubic feet per second (cfs) trigger, the Committee will:**

- Contact the roster of consumptive water users. Participants are asked to confirm their participation or non-participation in the Blackfoot Drought Response via “response cards”.
- Contact the roster of non-consumptive water users and alert them to the potential need for angling restrictions.
- Implement outreach activities necessary to inform water users and the general public of drought conditions and the need for participation in the Drought Response.

#### **When flows in the Blackfoot River fall to 700 cfs, the Committee will:**

- Notify consumptive water users (primarily irrigators) that the Blackfoot Drought Response is active and request implementation of their voluntary drought management plans.
- Confirm participation by junior water users through response cards, personal communication, and field checks;
- Convene and make recommendations on a “call for water” from non-participating junior water users under the Murphy Right;
- MT FWP, in consultation with the Committee, will issue a “call for water” from non-participating junior water users. Junior water users who receive a “call for water” are ordered to cease water withdrawals;

#### **If flows in the Blackfoot River are below 700 cfs and/or maximum daily water temperatures reach or exceed 73°F for three consecutive days at Bonner:**

- MT FWP will issue mandatory afternoon (2:00 pm – 5:00 am) fishing restrictions.

**As flows near the 600 cfs trigger, the Committee will:**

- Contact the roster of non-consumptive water users to alert them of the potential need for angling restrictions if not already in place or the need for additional angling restrictions.
- Implement outreach activities necessary to inform water users and the general public of drought conditions and the need for participation in the Drought Response.

**When flows in the Blackfoot River fall below 600 cfs, the Committee and MT FWP will:**

- Issue an Angler Alert
- Convene to confirm irrigator in the Drought Response.
- Request additional “calls for water” are made by MT FWP under the Murphy Right.

**If flows in the Blackfoot River are below 600 cfs and maximum daily water temperatures reach or exceed 71°F for three consecutive days at Bonner:**

- MT FWP will issue mandatory afternoon (2:00 pm – 5:00 am) fishing restrictions;

**If flows in the Blackfoot River are below 600 cfs and/or maximum daily water temperatures in the North Fork Blackfoot River and Monture Creek reach or exceed 60°F for three consecutive days:**

- MT FWP will issue mandatory afternoon (2:00 pm – 5:00 am) fishing restrictions on all critical bull trout streams. These include Gold Creek, Belmont Creek, Cottonwood Creek, Monture Creek, North Fork Blackfoot River, Copper Creek, Landers Fork, and Morrell Creek.

**If flows in the Blackfoot River are below 600 cfs and/or maximum daily water temperatures in the North Fork Blackfoot River and Monture Creek reach or exceed 65°F for three consecutive days:**

- MT FWP will issue mandatory all day fishing restrictions in all critical bull trout streams.

**As flows in the Blackfoot River near 500 cfs, the Committee will:**

- Convene to confirm irrigator in the Drought Response.
- Request additional “calls for water” are made by MT FWP under the Murphy Right.
- Implement outreach activities necessary to inform water users and the general public of drought conditions and the need for participation in the Drought Response.

**If flows in the Blackfoot River are below 500 cfs:**

- All water users junior to the Murphy Right, including those participating in the Drought Response, must cease junior water right withdrawals to satisfy MT FWP’s in-stream flow right. The Committee will also work with senior water right holders and seek further water conservation measures;
- MT FWP will issue mandatory all day fishing restrictions on the mainstem Blackfoot River as well as all critical bull trout streams if measures are not already in place.

### ***Agreements Outside of the Blackfoot Drought Response Plan***

In the Blackfoot, there are several cases where individual landowners have entered into agreements with an organization or agency in which management of water is described. These agreements may contain flow triggers that are similar to or the same as flow triggers described in this plan. While increasing in-stream flows is a common goal of the Blackfoot Drought Response and these agreements, they are managed separately. Enforcement of individual agreements is not dependent on implementation or non-implementation of the Blackfoot Drought Response.

### ***The Murphy Right in Non-Drought Years***

There will be years where flows in the Blackfoot River are average or above average and implementation of the Blackfoot Drought Response is not necessary. However, flows below the Murphy Right trigger (700 cfs) are likely even in normal years. As such, Montana FWP retains the right to make a “call for water” on water rights that are junior to the Murphy Right during non-drought years.

### ***The Montana State Drought Plan and Regional Rivers***

Unlike most areas in Montana, the Blackfoot is one of a few basins to have a developed drought management plan. The Blackfoot Drought Response Plan was designed specifically to address drought management in the Blackfoot watershed but operates in coordination with the Montana State Drought Plan and is subject to its regulations and requirements.

Other rivers in the region (Clark Fork River, Bitterroot River, and Little Blackfoot River) rely on the Montana State Drought Plan to dictate water use and fishing restrictions. Mandatory fishing restrictions on these rivers can have the unintended consequence of increasing angling pressure in the Blackfoot putting even more stress on the Blackfoot’s water resources. The reverse is also true. The Committee will maintain close communication with MT FWP on the management of other regional rivers. If mandatory fishing restrictions are requested on other regional rivers, the Committee will meet, review conditions, and may request that mandatory fishing restrictions also be issued on the Blackfoot River and core bull trout recovery streams to protect fisheries and water resources from increased pressure. MT FWP will consider restrictions on the Blackfoot to reduce pressure only if criteria under this plan or the “State” plan are present or imminent.

### ***Ending the Drought Response***

Between early and mid-September, drought pressures and stressors to the Blackfoot’s water resources usually begin to ease with cooler weather and increased precipitation. The Drought Committee, in monitoring conditions and forecasts throughout the summer will, as September approaches, begin to evaluate conditions and develop a recommendation to maintain, lift, or partially lift the voluntary drought response. Unlike other portions of this drought response plan, lifting of voluntary restrictions is not based on a specific flow or temperature trigger (unless flows and temperature recover to implementation triggers). Instead, the determination to maintain or lift the drought

response during a given water year is an evaluation of changing water flow, water temperature, biotic conditions, climatic and soil moisture conditions, irrigation demands, angling pressure, and long-term impacts on the fishery and on the water supply.

Ideally flows in the Blackfoot River near Bonner would be above 650 cfs (the Murphy in-stream flow after September 1<sup>st</sup>) at the Bonner gage station to lift voluntary irrigation measures. If flows recover above the drought plan triggers after the Drought Response has been implemented and appear to be more than short duration change, the Committee will recommend lifting drought response measures. Similarly, the Committee will recommend lifting any temperature induced angling restrictions if water temperatures are below temperature triggers in bull trout recovery streams and mainstem of the Blackfoot River for three consecutive days.

While it is not impossible for flows to recover above the drought plan triggers after implementation of the Drought Response, it has proven to be very unlikely. If flows have not recovered after implementation of the Drought Response, the Drought Committee must consider the short and long term effects of drought and will evaluate the following conditions in its decision to lift or maintain the Drought Response.

- **Climatic Conditions:** Hot and dry weather are likely to increase water demands to maintain soil moisture, crops, and fall/winter pastures. Additionally, hot and dry weather are likely to diminish flows and increase water temperatures. If hot and dry weather persists, maintaining the Drought Response until cooler, wetter weather is predicted may be necessary;
- **Water Demands:** Voluntary irrigation measures enhance river flows by an estimated 50 to 70 cfs each year which has kept flows above the 500 cfs in most years. If irrigation demands are likely to result in flows falling below the 500 cfs drought plan trigger, maintaining the Drought Response may be necessary. If irrigation demands have declined and flows are likely to stay above the 500 cfs drought plan trigger, or are gaining or stable, lifting the Drought Response may be recommended;
- **Angling Pressure:** Stress to fish during low flows is exacerbated by angling pressure particularly in core bull trout recovery streams and critical biological areas (key spawning, rearing and staging areas, important migration corridors and areas of thermal refugia). If stress to fish from low flows and high water temperatures is likely to increase from angling pressure in these areas, maintaining the Drought Response may be necessary. If flows and water temperatures are trending towards recovery (flow are gaining or stable and temperatures are below 60 °F) and angling is not likely to cause further fish stress, lifting the Drought Response may be recommended;
- **Social/Economic Concerns:** In general, the Drought Response will be lifted between September 1<sup>st</sup> and September 15<sup>th</sup> as overall conditions (flow and temperature) improve and water demands (irrigation and angling pressure) decline. Only under extreme conditions, where resource concerns remain elevated and/or significant impacts from lifting voluntary measures are predicted will the Drought Response be maintained past September 15<sup>th</sup>.