

Cherokee National Forest Landscape Restoration Initiative Meeting
Jonesborough, Tennessee
Steering Committee Meeting Notes
Thursday, September 29, 2011
9:00 a.m. - 4:00 p.m.

Committee Members Attending: Josh Kelly, at large; Danny Osborne, Tennessee Division of Forestry; Dwight King, Logging Company/Sullivan County Commissioner; Dennis Daniel, National Wild Turkey Federation; Steve Henson, Southern Multiple Use Council; Mark Shelley, Southern Appalachian Forest Coalition; Parker Street, Ruffed Grouse Society; Joe McGuinness, Cherokee National Forest (CNF); Catherine Murray, Cherokee Forest Voices; John Gregory, Tennessee Wildlife Resources Agency; Katherine Medlock, The Nature Conservancy.

Staff Attending: Karen Firehock, facilitator; Melinda Holland, facilitator; Steve Simon; consultant.

Committee Members Not Attending: Terry Porter, Tennessee Forestry Association; Geoff Call, U.S. Fish and Wildlife Service

Observers Attending: Leslie Avriemmo, CNF; Terry Bowerman, CNF

Agenda Item 1 – Results of the September 20, 2011 Public Meeting

Katherine Medlock reviewed her presentation from the September 20, 2011 public meeting in Erwin, Tennessee. Ms. Medlock explained how the modeling works, data sources used, type of ground truthing performed, and the role of the science panel. She noted that the most substantive questions were about the LANDFIRE model, how the committee selected the model, what baseline data were used, and how the data were validated.

Facilitator Karen Firehock stated that she saw a lack of understanding by the public about the modeling was utilized to derive the committee's recommendations, and noted that this suggests the need to provide additional description in the final report. Even though the report is for Forest Service (USFS) consumption, it may need more background/framework to introduce concepts at more depth to foster the public's understanding. Committee members stated that they believe the case statement says why these recommendations are needed. They also said that the report needs to explain uncharacteristic class (U-class) issues, and why the committee is recommending cutting uncharacteristic oak, pine, poplar. A clear explanation of Natural Range of Variability (NRV) and why the forest is 'out of whack' is also very important. Consultant Greg Low provided a list of all LANDFIRE models used, as revised; Ms. Medlock recommended adding this document to the report as an appendix. Mr. Low also suggested adding an explanation of U-classes, which are currently not well defined/described in the draft report. He also suggested adding as references an appendix or table containing the 'crib sheets' the committee has used.

The committee agreed on the need to add a written description in the main report about U-classes and the "U B Gone" model runs and recommendations. This could be added at beginning of the recommendations section. A committee member suggested inclusion of a reference to the science on the increase in u-class vegetation and why it is a problem - this explains the rationale for the entire effort of the committee. Others suggested first describing some examples of U-class in different ecological systems and to then refer the reader to the appendix for the details. Possible examples given included: tulip poplar dominated in an oak system; oak dominated in a pine system, white pine dominated in a cove system, or pine dominated in an oak system. These examples should also explain the committee's goals of shifting dominance of various ecological systems back towards NRV. Steve Simon offered to help write this report section on U-classes including an explanation of the major U-classes and the number of acres of each.

Committee members also agreed to add a brief executive summary to the report noting that congressional members or high-level decision makers are only likely to read an executive summary. Ms. Medlock agreed to draft an executive summary and have the committee review it. The committee agreed to add an appendix containing the most recent version of the management actions and results table (which Greg Low prepared) instead of a glossary of terms.

The committee discussed the schedule for completion of the draft report and opportunity for public comment on the report. The committee decided to extend the deadline proposed for public comments from October 20th to October 26th. If comments are submitted after 26th the committee will consider them, but may not be able to incorporate them into the report. The master report document will be posted on the committee's web site by October 12th. The facilitators will send an email to attendees from prior public meetings announcing when the draft report is posted on the web and giving the deadline for submission of comments. The facilitators will read and compile all comments, immediately sharing any which need committee consideration.

A conference call with the committee will be held the week of October 31st if needed to address substantive questions/suggestions/complaints from the public. Public comments are to be submitted to Karen Firehock; if the comment is a very simple question which has already been addressed by committee or is common knowledge, the facilitators will just draft a response. The facilitators will put all comments/responses in to a comment/response document and share it with the committee. Questions and issues on technical/policy issues will be sent to Ms. Medlock or USFS staff depending on the nature of the question/comment for a first draft response. Ms. Medlock noted that if the committee sees a consistent lack of understanding reflected in the public comments, we will need to clarify the report. The committee agreed to wait on drafting the executive summary until after the draft report is posted on the web site. Ms. Medlock recommended that if on the committee conference call the group decides that a November 10th meeting date does not give enough time to allow us to do the work needed based on public comments received, the meeting date could be postponed to a later time to allow for adequate review.

Agenda Item 2 – Monitoring Plan Implementation

Some committee members stated that the draft report section titled “Monitoring and Adaptively Managing Ecological Restoration” is too general and needs more work and specific details. Committee members noted that the committee needs to come back together periodically to assess progress in implementing the recommendations, and wants the USFS to track the types of implementation information requested by the committee. Discussion ensued on how to best accomplish the goals of monitoring and adaptive management.

A committee member asked when the USFS will start implementing these recommendations on the ground. A USFS representative estimated work could start in approximately 2 years; however they must go through the National Environmental Policy Act (NEPA) process on projects. The USFS is working to start incorporating these recommendations in current projects. If the USFS meets with the committee every 6 months, during the 1st year the group can discuss how USFS is incorporating the committee's recommendations into ongoing project planning. A committee member stated that the first type of monitoring needed is to track whether and how the USFS is implementing the CNFLRI recommendations; followed by whether the recommendations are effective in achieving the desired conditions on ground; finally revisiting assumptions based on field results. A committee member suggested that the group refer to the Four Corners restoration initiative monitoring plan for ideas.

Committee members discussed the need for item 1 in the draft report section which discusses documentation of the assumptions used in the modeling. Documenting all assumptions made in this modeling would be long and very detailed and might result in monitoring request that is too prescriptive and detailed. So the next question is which assumptions are most important to the committee or that could serve as metrics of success or trends? It

was noted that the committee has been working to document these assumptions, but there are still some modeling assumptions that a few committee members have less confidence in. For example, the existing levels of disturbance assumptions for the northern hardwoods system may be found to be incorrect. The intention is to create a list of key assumptions under item 1 then decide how to test these assumptions.

Mr. Simon reminded the committee that the LANDFIRE models drove VDDT; and that the assumptions are documented in LANDFIRE. The committee's additional assumptions (such as seed sources for pine when burned) have been tracked by Mr. Low. Mr. Simon suggests that scientists should track these modeling assumptions over the next 20 years. He noted that we can track departure from NRV in 5 years. He further recommends that the USFS document all types of disturbances in the forest (for example, how much is being burned; impacts of storm damage, etc.) that the committee used in its modeling.

A committee member noted the need to track the reduction in ecological departure scores and reduction of U-class vegetation by setting goals/targets and obtaining the information needed to evaluate results. Another member stated that the group's major goals are: open canopy, create early successional habitat, and reduce U-class – so there needs to be a way to check how well this is happening over time. There should also be performance measures and tracking for some early projects. The goal is to eventually test these hypotheses in all forest types, so there needs to be enough projects to do be able to do this.

Mr. Simon suggested that the group could defer development of specific metrics for monitoring until the first watershed project; however another member stated he did not want to lose the focus on monitoring in this report. A USFS representative stated that having a list in the report on what needs to be monitored would be helpful to the USFS to prioritize how they spend available dollars for monitoring.

Based on the committee's discussion, Ms. Medlock suggested the following activities:

- Implementation monitoring – the committee will review projects coming out of planning to see if the USFS has incorporated our recommendations. Re-convene this committee in around 18 months; then decide how often to meet in the future.
- Long term effectiveness - to re-evaluate improvements in departure from NRV scores over time. It was noted that the committee's evaluation of effectiveness needs to be ahead of the forest plan revision process (it was estimated that the USFS will start the planning process in 2014 or 2015, but it is uncertain as to when a draft plan could be available). Thus the committee could do long-term effectiveness evaluation before the draft revision of the CNF forest plan or in five years, whichever comes first.
- Form a subgroup for monitoring – it was suggested that this subgroup report back to the full committee; the sub-group would focus on the first project in each S class in each ecological system. The composition of this subgroup could be decided at the meeting held in 2 years; or it may evolve out of the watershed team TNC hopes to form.
- Project level review in one watershed, or a few projects (questions to be addressed include: How many projects? What will we monitor?)

The committee discussed establishing a monitoring sub-group. It was noted that some members did not sign up for 10 year project while others will be doing this anyway as part of their job or role. Meeting frequency and start time for this subgroup was discussed as was the need to be involved in an early project at watershed planning level.

A committee member asked if the USFS could begin this type of monitoring with the current Flatwoods timber sales, noting that some of the units are having pine and poplar stands removed to restore oaks with 2 – 40 acre

openings to be created. He stated that doing this would give a much earlier start to project monitoring. A USFS representative responded that the question becomes will we have/create the type and level of detail of data needed to monitor committee recommendations for the Flatwoods timber sale? Mr. Simon noted that we now have U-class data for the entire forest, thus he could easily generate data for the Flatwoods sale area. Several committee members supported the concept of starting monitoring with this timber sale, noting that the monitoring protocol would be needed much sooner if the group decides to do this.

A committee member asked what type/amount of monitoring was included in the Flatwoods sales. A USFS representative offered to bring this information back to the group, he also noted that this sale was one of the first on a watershed scale. Mr. Simon offered to donate some time over the next 2 months to gather data on the Flatwoods sale area. He suggested setting up a one day meeting in the Flatwoods area to see what is there. He will also need information from the USFS original inventory for the sale.

Ms. Medlock stated that TNC's watershed level team proposal could start very soon. The group then discussed the appropriate stage for a watershed they might consider. A USFS representative stated that they have a watershed they were planning to start this October, and they could add an enhancement to the USFS current watershed assessment process by expanding it to identify U-class stands for treatment along with consideration of marketability. The USFS allots one year for the watershed assessment process and prefers to do assessment field work in the winter. After the assessment is done, the USFS does a NEPA Environmental Assessment (EA) the following year, so this is a two-year process. This topic was discussed further under Agenda Item four below.

In response to a member's question, Ms. Medlock explained that TNC's agreement with the USFS is a challenge cost share agreement which runs for five years and that they are currently two and a half years into this agreement. The agreement may be renewed. TNC currently has funds adequate to do watershed level recommendations in agreement. She believes the original funding request also included monitoring.

Ms. Medlock agreed to incorporate revisions before October 12th to the draft recommendations document based on the committee's discussion at this meeting.

Agenda Item 3 – Financial Support

The committee discussed the draft report section titled "Financial Support for Recommendations." They agreed on the need to add language that the committee considered a range of possible implementation costs to the first sentence in this section. They also recommended that the second sentence state that the committee considered a range of treatments which ranged from the highest of \$1,383,000 a year (the maximum ecological benefit restoration scenario) to the lowest cost of \$227,000 (for minimal treatments) and that the reader reference the Appendix for further details.

The committee also suggested adding a preamble explaining why implementation of the committee's recommendations will require additional USFS staff for monitoring and enforcement. More law enforcement and protection will be needed due to projected increased activity in ecological management which means more logging roads, skid roads, and fire breaks that may be subject to illegal ATV use, as well as more planting projects that could be subject to damage or vandalism. The committee also agreed on adding language on the local financial benefits which will result from the recommended restoration activities, such as: local jobs, hunting and fishing, and clean water benefits. Josh Kelly offered to provide additional data about benefits to the local economy.

A concern was raised about including the maximum ecological benefit as a “stretch goal” in the recommendations as the resulting number of acres treated is so huge as to be unrealistic. The maximum ecological benefit goal requires a 400-500 percent increase in projects implemented per year. Committee members agreed that the language on maximum ecological benefit as a stretch goal be removed from the recommendations section of the report, but be kept in the financial section as a statement of what it would hypothetically cost to do maximum ecological benefit treatments. One member also noted that the estimated cost of \$1,383,000 is not accurate as a net number since it does not account for income from timber sales that would offset this cost.

Bullet 3 of this section: Additional openings created by restoration projects are often opportunities for additional incursions and vandalism in the forest. In order to protect the investment required for restoration, the committee recommends additional investment in law enforcement and other ways to prevent access.

Last bullet - rare communities: Most rare community restoration projects are multi-year projects and costs vary from year to year. Therefore a range was proposed based on recent project experiences. This figure proposes an additional amount (beyond current USFS budget for rare communities) be spent on this restoration. Currently there is almost no USFS funding for rare community restoration. TNC is spending \$25 to \$30K on bog restoration currently. There was agreement to take out the total cost sentence at the end of this draft.

The committee discussed strategies for obtaining the additional funding needed, and decided to continue that discussion at the November 10th meeting after the draft report is finalized.

Agenda Item 4 – Implementation Pilot at Watershed Scale Proposal

Ms. Medlock explained TNC’s goals to continue the committee’s efforts at the watershed level noting that the first project will be a key measure of success of the committee’s recommendations and collaborative process. She noted that the committee’s report has deferred many issues to the project or watershed level of activity. TNC would like the committee to commission a watershed sub group. Forest Service representatives stated that they are enthusiastically asking for the group’s help at the watershed level. In the next fiscal year, two watershed projects are scheduled: the Offset Area in Sullivan county; and upper and lower Paint Creek. Several committee members commented that Paint Creek has many excellent restoration opportunities. Mr. Simon and Ms. Medlock reminded the group that they need to consider U-class, slope, rare communities, and other characteristics to select an appropriate watershed for a pilot project. Ms. Medlock told the group that TNC has nine meetings budgeted for the watershed subgroup.

This could be a one-year process doing same work as CNFLRI but at a watershed scale with potentially some additional analysis such as opportunities for rare communities, linear wildlife openings on roads, etc. Normally the USFS generates an opportunities list from which they derive the proposed actions. The watershed subgroup’s charge would be to develop the list of opportunities. The USFS will then use that list to develop the proposed actions. Committee membership would need to be modified to include some local scale knowledge. Also a strong public participation opportunity would be added to this work. It was suggested that the USFS should be the one to be managing the public involvement process. However, USFS staff noted that they would manage public involvement once the project goes through the NEPA process but they asked that the committee consider managing public engagement so that any recommendations sent to the USFS would have been vetted with the broader community first. The group discussed Federal Advisory Committee Act (FACA) concerns and noted that the pilot may need to be a TNC-sponsored project.

All committee members present at this meeting expressed support for and an interest in participating in the watershed subgroup of the CNFLRI. Steven Simon noted that he wishes to continue to help and be engaged in the process. Committee members expressed understanding of the potential need to involve other individuals or organizations in this sub-group. Ms. Medlock suggested first determining who on the committee wants to participate in the watershed sub-group, then do a self-assessment to determine which, if any, interests are missing and should be added.

Ms. Medlock stated that the next step is for TNC to meet with USFS and determine how the pilot can proceed and avoid FACA conflicts. She will report back to the full committee on November 10th if ready by then, or as soon as possible.

Agenda Item 5 - Review of Master Document and Remaining Tasks

TNC will have their technical editor edit the draft recommendations report for grammar and organization and will send it to the committee showing track changes before sending it on for final printing. The committee agreed to move the acknowledgements to the front of report and that the public participation section is fine where it is.

Adding a sentence about ground truthing in the methodology section was also suggested. This language should address the concern that the tools and models used by the committee are the best available but they may not reflect what is on the ground in every case, so in the ground truthing will also be needed.

The group agreed to move the language at the bottom of page 10 about the change to the NRV number for the cove forest system to become a bullet in the previous section, which explains the revisions made to the LANDFIRE model.

The report only has contains one sentence regarding the use of partnerships. Mark Shelley will draft a short section on partnerships and circulate it to the committee by October 12th.

Greg Low performed a model run which increased the amount of old growth by 1 percent. A committee member requested that in montane oak systems and dry mesic oak system stands over 120 years (where most of the trees are over 120 years in age) should be left alone to become old growth for the 20 year planning horizon proposed in the committee's recommendations. This proposal should not change the amount of early successional created, nor the number of acres treated in those forest types; it will just avoid the older stands. Another member noted that this modified model run would need to be used as the committee's updated UB gone model run for the report appendix. Another member supported the proposal, noting that the committee is recommending creation of a lot of early successional habitat but the forest needs more old growth. Other committee members expressed concerns about how the USFS would decide on the point in time to apply a restriction on cutting stands over 120 years. Mr. Simon noted that most stands over 120 years are already inaccessible or are in wilderness areas so he does not think this restriction will impact the amount harvestable for the committee's recommended treatments. A total of 86,000 acres still remain available to cut in these two systems. Other members stated that they prefer no further restrictions of this nature and a few members felt that the old growth would occur without taking any additional action since trees will continue to age over the 20-year report implementation period.

Ms. Medlock agreed to draft and circulate some language to reflect the suggestion that the committee recommend that the USFS consider this suggestion in its watershed level analysis and assign a higher value to

protect old stands (not just single trees), and focus treatments on younger 60- 80 year stands in those two classes the range of ages that allows this choice.

Proposed committee schedule:

- October 12 - Post the draft report on the web
- October 26 - Public comments due
- Week of October 31 - Committee conference call to review public comments and possible changes to the report
- Before November 10th - make edits and have a final non-typeset version to circulate to the committee
- Nov. 10 committee meeting – finalize the report, watershed pilot sub-group, and celebrate accomplishments

Action Items:

- Steve Simon offered to help write a report section on U-classes including an explanation of the major U-classes and the number of acres of each by October 12th
- Ms. Medlock agreed to draft an executive summary and have the committee review it (to be completed after final report language has been agreed upon).
- Joe McGuiness will provide the committee with information about what type/amount of monitoring was included in the Flatwoods timber sales.
- Mr. Simon will gather data on the Flatwoods sale area and will set up a one day meeting in the Flatwoods area to view what is there.
- USFS to provide Mr. Simon with information from the USFS original inventory for the Flatwoods sale.
- Ms. Medlock agreed to incorporate revisions to the draft recommendations report before October 12th based on the committee's discussion at this meeting.
- Josh Kelly offered to provide additional data on benefits to the local economy.
- Ms. Medlock (TNC) will meet with USFS and determine how the watershed pilot can proceed. She will report back to the full committee on November 10th if ready by then, or as soon as possible.
- Mark Shelley will draft a short section on partnerships and circulate it to the committee by October 12th.
- Ms. Medlock agreed to draft and circulate language on the old growth recommendation.