



Roundtable on Sustainable Forests

A Partnership for the Future

WESTERN REGIONAL WORKSHOP ON SUSTAINABLE FORESTS

February 3 & 4, 2004

Wyndham Phoenix Hotel, Phoenix, Arizona

MEETING SUMMARY

The Roundtable on Sustainable Forests (RSF) and the USDA Forest Service convened the Western Regional Workshop to broaden and deepen the understanding and utility of the Montreal Process Criteria and Indicators (C&I) as a tool in the management of sustainable forests. The workshop also included an explicit evaluation of the C&I as a framework for integrating sustainable forest indicators into planning and monitoring at various scales. Finally, the sponsors also sought feedback on the relevance and utility on the *National Report on Sustainable Forests—2003* for decision-making at sub-national scales.

The workshop aimed to achieve a better understanding among Western stakeholders of the opportunities and challenges associated with the goal of sustainable forest management (SFM), focusing on local issues on the ground such as fire/fuels, invasive species, fragmentation, and unmanaged recreation. In addition, the workshop was designed to serve as a catalyst and foundation for ongoing dialogue on regional cooperation, partnerships and next steps. See Attachment A for the workshop agenda and Attachment B for the participant list. All workshop presentations are available in the meeting and workshop summary section of the [RSF web site](#).

Welcome and Opening Remarks

Sarah Walen of Meridian Institute welcomed the participants on behalf of Meridian, RSF, and the Western Workshop Steering Committee. Scott W. Bell, rural community assistance coordinator for Regions 1 and 4 of the USDA Forest Service, briefly described the purposes and activities of RSF, which was established in 1998 as an open and inclusive process committed to improving decision-making. The RSF operates on the basic premise that better data lead to better dialogue and better decisions. He also reviewed the workshop goals and objectives.

Steve Gatewood, program director for the Greater Flagstaff Forests Partnership, which hosted the workshop, welcomed everyone to the workshop. He explained that the Partnership is a community-based partnership of diverse forest stakeholders that works with the USDA Forest Service to restore natural ecosystems and engages in community forest monitoring. The Partnership also sponsors public education and sustainable economic development activities and aims to make a combination of prescribed burning and natural fire the primary means of maintaining forest health and preventing catastrophic fires. It also advocates for the use of a mix of treatments in the adaptive management process that reflect societal values and needs. Finally, the Partnership works toward having the Flagstaff community served by appropriately scaled business enterprises that are based on a sustainable yield from local forests, rather than economic needs outside the region.

Jack Troyer, USDA Forest Service regional forester for the Intermountain Region, spoke next, stressing the need to bring C&I to the local level in the West. He noted four threats to the nation's forests and grasslands, all relating to sustainability: catastrophic wildfire and fuels buildup, invasive species, loss and fragmentation of open space, and unmanaged recreation, particularly the explosion in off-road vehicle use. He noted that the Workshop Steering Committee attempted to design an agenda that would scratch the surface of the wide-ranging Western forest concerns and build a bridge between national, regional, and local issues.

Phil Janik, retired USDA Forest Service veteran and former RSF Co-Chair, provided an overview of the U.S. commitment to sustainable forests, the use of the Montreal C&I framework, and the role of the RSF in applying it. He reviewed the *National Report on Sustainable Forests—2003*, noting its value in advancing a national framework, providing a common language for sustainability, and taking a first step toward identifying regional and local trends in forest health. He added that although the criteria are universal, there is flexibility in applying them, depending on regional characteristics and concerns.

In conclusion, Janik said that forest sustainability should not be an initiative, but should serve as the underpinning for forest management, likening it to Robert Frost's "Road Less Traveled." A discussion followed on the "road less traveled" (sustainable forests) and the alternative well-traveled road. Janik suggested that the well-traveled road would be the easier, simpler, more certain one, and a participant added that it is the road of unsustainable development that has historically been followed. Another participant commented that the well-traveled road might focus on pushing people to act rather than relying on good natural and social science to engage communities of interest and communities of place.

Additional comments and questions addressed the following topics.

- The Sustainable Forestry Initiative (SFI) does incorporate the C&I, but uses a language that is appropriate for landowners. However, an SFI external review panel has recommended making its connection to the Montreal C&I more visible.
- Public land managers have not done enough. The Montreal C&I can be made more visible through their use on federal lands.
- The Montreal Process involves a suite of tools to get to the complex issues identified by the Brundlant Commission and Agenda 21. However, everything has to be demonstrated on the ground. If we can demonstrate better forest conditions and engagement with local communities, we have done a great deal to move forward.

Sustainability and Establishing Values and Goals at Multiple Scales

Tom Hoekstra, director of the USDA Forest Service Inventory and Monitoring Institute, spoke on the importance of understanding values at all scales in order to understand how to use C&I at the local level. He said that because system properties change with scale, no single economic or political system could address the full range of sustainability issues. While we need to be neutral and factual about forest conditions, Hoekstra said we have to start with values statements.

One participant asked about short-term and long-term costs, noting that short-term costs can seem prohibitive if they are not considered in the context of potential long-term effects and benefits. Hoekstra said the Institute had thought about temporal scale dimensions, which are attached to spatial scale, but mainly as a governor of what can be accomplished.

A discussion followed on a commonly held view that people are an invasive species with no positive impact on the land. One participant said it is difficult to appeal to private landowners because many of

them believe this view is the driver behind C&I. Hoekstra said the comparison of people to an invasive species just illustrates that we have to think about how we define issues. For example, in examining the historic range of variation, how far back in history do we go? A participant said there seems to be an assumption in historical perspectives that nature is non-dynamic, adding that a major problem exists if we start with idea that humans are above nature. Another participant said that because of changes in ecosystem function, some species that have been present for thousands of years could become invasive.

It was suggested that we could engage more landowners by appealing to our shared interest in future generations and the options we are leaving our children and grandchildren. A participant said if there is a flaw in applying the Montreal C&I, it is neglecting the social aspects and focusing more heavily on the environmental component. Part of the challenge before us is to bring the human issues into the conversation.

Breakout Session I: Sharing Perspectives on the Values and Goals of SFM

In four groups of 12 to 20 participants, facilitated discussions inquired about what values sustainable forests should preserve, what goals have been or could be set to preserve those values, and how those values and goals apply at various scales. Collectively, the four groups produced the following ideas.

Values to be preserved through SFM:

- Meeting the needs of both the people and the land;
- Allowing people to continue living in rural areas;
- Preserving cultural values linked to traditional communities (such as plant gathering);
- Preventing conversion and fragmentation;
- Educating the public to renew their connection to forestland and its values;
- Preserving ecological viability, biodiversity, and natural life systems;
- Keeping some part of the landscape free of human control;
- Increasing forest resiliency and resistance to stresses and disturbances;
- Using more holistic approach to decision-making;
- Considering impacts on other resources such as rangelands, mineral resources, and water;
- Improving forest policy based on better data that encompasses social, economic and ecological issues;
- Increasing the predictability of forest management decisions and preventing “knee-jerk” decision-making based on politics and changing administrations;
- Maintaining jobs, commodities, aesthetics, cultural values, recreational use, and community spirit;
- Protecting forest communities from fire and other potential hazards;
- Fostering stakeholder collaboration by balancing self-interest with community interests and keeping citizens informed; and
- Considering the impact of current actions on the next seven generations.

Goals for protecting these values:

- Achieving the long-term commitment and follow through of agencies and their staff to preserving multiple forest uses, despite personnel changes;
- Allowing for collaborative decision-making that emphasizes shared learning and overcomes political interests and differences;
- Drawing local people into the decision-making arena;

- Abandoning the sustained yield concept;
- Recognizing traditional values, processes, and expertise in managing land;
- Recognizing Tribal history and expertise in managing their lands;
- Creating a foundation for communication, such as the *National Report*, and defining the desired future condition of the forest as a basis for shared decision-making;
- Using dialogue and other means to integrate the diverse information streams produced by rules and regulations to advance sustainability;
- Communicating sustainability values to the public;
- Setting goals for sustainability that integrate the various resource areas—forests, rangelands, minerals, and water, as well as looking across jurisdictional boundaries;
- Managing on a landscape scale rather than for individual species;
- Establishing reasonable, environmentally sound thresholds that small landowners can meet;
- Managing land on the basis capability and ownership, rather than managing every acre for every value;
- Recognizing that some acres may be devoted to specific management goals and others may require no management at all;
- Using flexible approaches such as adaptive management;
- Investing more public dollars in private lands;
- Investing in local communities to promote forest industries and to rebuild the viability of natural-resource based industries; and
- Investing in the development of value-added products, as well as markets for small-diameter trees and underutilized species.

Applying these values and goals at different scales:

- At a broad scale, agree on a vision or some core set of values, but recognize that expectations differ at various scales.
- Use a collaborative approach that considers a full range of issues in addition to forest health.
- Incorporate community ethics into forest management plans as a component of sustainability.
- Decentralize national forest management to give local communities a stake in management of area forests.
- Fund watershed or community-based monitoring.
- Provide local communities with access to federal land for stewardship purposes.
- Depending on the scale of application, clarify that shared decision-making may actually be shared influence to affect decisions.
- Encourage the development of appropriate-sized businesses in forest-dependent communities.
- Educate the public and environmental groups to prevent litigation on harvesting, reduction in fuel load, and restoration projects that provide economic support to rural communities.

The Quest for Sustainability and Local Unit Criteria & Indicators Development (LUCID) Project

Gary Larsen, Forest Supervisor on the Mt. Hood National Forest, made a presentation about the Mt. Hood experience with LUCID. After providing a review of the historical, philosophical, and scientific perspectives that have contributed to modern notions of sustainability, he said that sustainability is both a science and an art that we are creating by the act of working together.

Mr. Larson said that C&I are an important part of this science-art fusion. They are essential for helping people tell a story that redeems their values, while also helping natural resource agencies “get their arms around” important and complex issues. He said that the important job for sustainability practitioners is to

identify the common ground among competing social, ecologic, and economic interests, and to find ways to make that area of overlap grow. Communication and dialogue are essential tools in doing so. He also said that in his opinion the goal of natural resource management leaders is to help citizens find and recognize our collective social, economic, and environmental interests, and to forge ways to collaborate in their fulfillment.

Mr. Larsen then began to describe the Mt. Hood's experience with LUCID. Focusing on the social dimensions of SFM, he said that the project began by incorporating the notion of communities into forest management and considering the questions of sustainability of what, for whom, and why. They quickly learned that measurement is a daunting task, especially with regard to collaborative stewardship, community resilience, institutional adequacy, social and cultural values, and community livability.

The Mt. Hood LUCID team is still working to discern the right questions and who is best suited/positioned to ask them. At the same time, their work produced some important findings, namely:

- Recreation and restoration is going up, while road building and timber harvest are going down.
- Rare and Endangered Species management is becoming a driving issue.
- Municipal water supplies involve 95% of the Mt. Hood.
- Benchmark conditions are essential for measurement.
- We are experiencing and creating changing models of governance.
- There is a "New West" where cosmopolitan urbanites voluntarily choose to live in or care about the forested landscape.
- Values are changing – people think globally and act locally.
- Fire is an important part of the forested landscape, and people have changed its historic patterns.
- The Mt. Hood is part of the larger social, ecological, and economic community in which it resides.

In his closing remarks, Mr. Larsen said that we are engaged in no less noble a task than expanding the frontiers of democracy and laying the foundation for future development that integrates the social, economic, and environmental dimensions of sustainability. An essential element of both of these is leading citizens to recognize and accept their shared responsibility as stewards of the planet.

In the question period that followed Mr. Larson's presentation, one participant said that she liked comment about what the questions are and who gets to ask them. It resonated with one of the workshop's objectives, to decide together what the questions are. Another participant said he found nurturing the "sweet spot" at the intersection of economic, ecologic, and social spheres is an interesting way to think about sustainable development. He asked Mr. Larson how one might assess the magnitudes of change in its size. Mr. Larsen responded that you have to start at the local level and that changes in the size of the intersection are less about "technical stuff" and more about connecting to people. Technical ways of understanding the world are narrow in the sense of being reductionist or biased by the predominant lens of the discipline. Hearing from the people who live in, on, and with the resource forces you to think more holistically. Finally, one participant asked how the Mt. Hood LUCID team decided to ask what the important questions are. Mr. Larsen's colleague, Nancy Lankford, answered that the approach was to get broad community involvement to set reference values and get public buy-in. She said that getting the right people in the room in terms of ownership and expertise are important for developing something truly useful.

Greater Flagstaff Forests Partnership

Steve Gatewood, program director of the Greater Flagstaff Forests Partnership, described this collaboration among participants from key sectors—business, community, and nongovernmental organizations—in cooperation with the USDA Forest Service. Partnership members include the Grand Canyon Trust, The Nature Conservancy, Southwest Forest Alliance and Center for Biodiversity. Many environmental groups have not joined the partnership because they prefer to stay independent, dealing with the Partnership and USDA Forest Service on their own terms. The Partnership’s goals are to restore natural ecosystem functions, reduce catastrophic wildfire risk within the Flagstaff urban interface, and to research, test, and demonstrate key ecological, economic, and social dimensions of restoration. Its key elements are community involvement, an ecological framework, research and monitoring/adaptive management, and forest utilization/economic development.

Follow-up discussion focused on the following topics.

- The Partnership has enabled participants to take better advantage of cooperative programs that come through states. It is working on managing across boundaries as well.
- The partnership has tried to match adaptive management with National Environmental Policy Act (NEPA) guidelines. However, it does not replace NEPA, as the USDA Forest Service clearly has responsibility for the final environmental assessment. Adaptive management could potentially be a viable tool under NEPA for creating endangered species assessments that bracket a range of activities under an umbrella analysis.
- Prescribed burns return the land to existing natural processes. In the past, early spring fires maintained the ponderosa pine ecosystem.
- Separating forest needs from economics in the decision-making process is extremely difficult. The Partnership wants to answer the question of what is the sustainable yield of wood that can be used for various types of value-added products over the long haul.
- Because there is no industry in Northern Arizona, most of the harvest is burned, and some is taken to a landfill for disposal. There is literally no market for wood, although some people are taking wood to Phoenix to convert to pellets. There also is some discussion of producing biomass fuel in the Flagstaff region.
- The USDA Forest Service and the Flagstaff fire department have an active smoke management plan and are looking at the issue of smoke created by prescribed burns. They probably eventually will have some sort of right-to-burn legislation.
- The Partnership is working with non-industrial forest landowners under a State grant for work with owners of two to ten acres, and it is seeing some change in their management philosophies. The fire districts around Flagstaff are also working actively on public land.

Wallowa Resources Community Forestry Partnership

Diane Snyder of the Wallowa Resources Community Forest Partnership explained that Wallowa Resources was created in response to natural resources conflicts and their economic consequences. The organization’s work involves resource stewardship, business development, education, outreach, place-based collaboration, and policy development. It performs forest stand assessments involving 70 percent of the largest landowners in the area and creates the capacity for fuels reduction where there formerly was none. A range stewardship program, which began with two people in 2000 and employs 23 today, treats noxious weeds in hard-to-reach places. The program has culminated in community range assessment, analysis of recreation and roads, and riparian restoration and analysis. Wallowa Resources works on both public and private lands. The organization collects data on socio-economic sustainability indicators and

gets biophysical data from state and federal agencies. Wallowa Resources also focuses on value-added forest products in order to revive the local forest products economy.

Ms. Snyder said that Wallow Resources views the Montreal C&I as a framework to help understand data on the ground and to make connections to efforts like LUCID projects, state C&I efforts and, ultimately, the Montreal Process. She stressed the importance of asking about locally relevant indicators, comparing them with the Montreal C&I, determining which of the Montreal indicators were meaningful at the local level, and noting if any of the local indicators were completely new. In describing her own local C&I process, Ms. Snyder shared seven key questions that were asked of local stakeholders. They were:

- What is the baseline condition of the economy, social well being, and quality of life, and what factors and trends affect these conditions?
- What key assets and business and workforce capacity is available for ecologically sustainable natural resource management, economic development, agriculture production, etc.?
- What are the opportunities to use local skills, businesses, and resources to address ecosystem restoration needs and create by-products or value-added products?
- How can investments in community-based watershed restoration lead to improvement in natural resource management, generate economically viable local employment and income, or improve the socioeconomic conditions?
- Where and how can investments in high priority watersheds for conservation and restoration be most effective in providing benefits to local communities?
- What are the tradeoffs between choices for ecosystem restoration management activities and what are the distribution of impacts on local communities, other individuals, and future users of the area?
- How are communities involved in decision-making, implementation, and monitoring, and are these efforts effective?

As a community on the outer edge of implementing C&I, Wallow Resources confronts several challenges. First, it is difficult to figure out what pieces of information are significant and even harder to determine which biophysical data the USDA Forest Service no longer monitors. As a community organization, Wallow Resources has to find the energy and support to collect information in useful ways and must advocate for more USDA Forest Service funding. In addition, not all indicators can be aggregated. Finally, landowners do not trust outsiders and unfamiliar processes, having lost a sense of their power after being told what to do by so many for so long.

The discussion that followed the presentation covered the following points.

- Wallowa Resources has worked hard to bring people together to reduce conflict in the decision-making process. For example, progress is being made in one of the most litigious forests in USDA Forest Service Region 6, and there is hope that demonstration projects can educate the community and create trust among interest groups.
- The lack of trust between environmental groups and the USDA Forest Service is much more pronounced than among other interest groups. The district ranger understands this and is working to overcome it.
- Additional people and institutions that have played important leadership roles include the local government (local county commissioners); the Oregon State University extension service; USDA Natural Resources Conservation Service; and the local conservation district. The partnership also worked with Sustainable Northwest because many issues are shared across the entire region.
- Until recently, 99 percent of Wallow Resources' funding came from foundations and government. Now there are four revenue-generating programs.

- Nonprofits are assuming the traditional governmental role in community development and other local activities. In places dominated by public lands, there needs to be a reciprocal relationship between the general public, who owns the asset base, and the local community.

Yakama Agency Forest Health

Edwin Lewis, Forestry Manager for the Yakama Agency Bureau of Indian Affairs (BIA), Division of Forestry, made a presentation on SFM on the Yakama Reservation in southwestern Washington, focusing on the Yakama strategy to control spruce budworm outbreaks. The Yakama reservation contains 1.4 million acres, of which nearly 650,000 acres are forest. In managing the forest, the Tribal Council aims to sustain cultural resources, fish, forest health, range, revenue, employment, water quality, and wildlife. Lewis said an unhealthy forest is characterized by an elevated level of insects and disease, with a high rate of tree mortality and diminished forest productivity. A healthy forest maintains a diversity of plants and animals, aesthetic appeal, resource sustainability, and resilience to disturbance.

On the Yakama Reservation, declining forest health has resulted from fire exclusion, poorly managed livestock grazing, and selective timber harvest. These influences have resulted in increased stand densities and reduced tree vigor. Over the last 40 years, extensive areas of the Yakama forest have become dominated by Douglas fir and grand fir, both of which are attractive to spruce budworm. Severe budworm infestations led to an outcry among Tribal members about extensive defoliation. In response, the Tribal Council pursued various strategies for controlling the infestation and concluded that habitat manipulation was the most effective means of control. In the short term, the Council sought to recover the value of dead and dying trees, with a long-term goal of promoting the development of a more resilient and sustainable forest. Efforts focused on thinning the forest resulted in drastic changes that required communicating with the public to explain how forest management actions protect long-term forest health.

Today the land has healthy fir, pine, and larch, with defoliated fir removed. Natural fires occur every 9 to 30 years, and the Yakama and other Tribes use prescribed, low-intensity fire more frequently. In keeping with the historic context of the forest, the Tribe does not use fast growing trees, but manages for a variety of timber. They tend to favor natural generation of Douglas fir, ponderosa pine, and larch.

Questions and answers covered the following topics.

- BIA meets with the cultural committee of the Yakama Tribal Council to set cultural resources as a top natural resource management priority. This can sometimes be frustrating when things like road construction are involved, but BIA has Tribal representatives consulting on the ground.
- The Yakama Nation has had a forest products enterprise for about six years, and this enterprise markets its products nationally. The enterprise is limited to reservation forests because the Tribe does not have to contend with a public outcry from environmental groups on timber sales. They comply with NEPA, put plans out for comment, and typically receive none. The process is much easier for the Tribe than it is for the USDA Forest Service.
- The Yakama experience is special because the value of the forest is seen as something that transcends generations.
- The Yakama may not accept the C&I verbatim, but they are aware of them and try to translate them into management.
- Some Tribes rely on the forest as the sole source of economic activity and are driven by survival to harvest timber. The income from the forest supports teachers, fire fighters, and police.
- Representatives from the Sustainable Forests Initiative and the Forest Stewardship Council contacted the Yakama about doing a pre-certification assessment. The third-party aspect of

certification made some Tribal Council members uncomfortable about sovereignty issues. Currently, the tribe is avoiding certification.

- The greatest barrier that Yakima BIA experiences is a lack of personnel. Field staff work six days a week, ten hours per day, just to keep up. There is also a need for more interdisciplinary personnel to help optimize management decisions across resources.

Reflections on Breakout Session I and the Case Studies

Group 1. This group reached no consensus on what a “value” is, and there probably needs to be more discussion around that topic, recognizing that today’s values are completely different from those of 10 years ago. Based on the day’s discussions, he concluded that the person appointed as the regional or state forester or ranger is as important as anything else in making a process work. The concept of providing for future generations and preserving options resonated as well. Another participant felt a lot of confusion about what the Montreal C&I represent. Although they represent social values—things that are important to consider—they cannot demonstrate whether or not management is sustainable. They only indicate what has already been done. The challenge is deciding what is the desired future condition.

Group 2. The intergenerational equity of environmental, economic, and social values contributes to a stable society. It is important for the forest to maintain the capacity to evolve, free of human control, in a process of natural regulation. Also, interest group gate keepers have put the interests of those with the most access to decision-making in the driver’s seat, while those with the least access, those on the ground, are ignored.

Group 3. The values the group discussed ranged from resiliency to resistance, with the recognition of economic value, ecosystem functions, open participation, the role of people and communities, Tribal history and expertise, and natural resource based enterprises. He said that poverty adjacent to public lands is not acceptable. In addition, we cannot manage every acre for every value. The question is how to achieve sustainability in a changing world.

Group 4. The fourth breakout group reported that the goal is to keep forestland in forests, while still using forest resources. Their representative said that we must create an ethic that enhances both environmental and economic values. Many values are readily articulated, but there is disagreement over the extremes, the desired future condition, and the relative balance of the values. The core problem is a lack of trust to move forward.

In a general discussion that followed, the following points were made:

- Natural resource conflicts are perpetuated by warriors whose identities and salaries depend on ongoing battles. Taking conflicts to court removes trust and prevents people from talking.
- More work is needed to move the three spheres of sustainability into congruence.
- One of the things we heard in the case studies was the value of organized venues for bringing people together and giving them standing as a community. This creates relationships that allow people to talk. Obviously that incurs overhead costs, but case studies show that it is worth the expense.
- A lot of forest management actions are based on an expectation of immediate ecological results. We may need to refocus our efforts on socio-economic issues at the local level, rather than across the entire country, because that’s where successes occur. We need economic incentives to get people to do the right thing. If we want to protect forests and keep communities where they are, we might have to look at subsidies for infrastructure to support local industry.

- We will always have differences of opinion, but we need to have trust that process will take us where we need to go. People will trust a process only insofar as we build trustworthy processes. Trust would be greatly enhanced if goalposts were fixed.
- We need to recognize that political interference is a reality and diffuse it with involvement. We should get politicians involved in the process earlier.

Use of Criteria & Indicators and Sustainable Forest Management at Different Scales in the West

National Scale

Dave Radloff of the USDA Forest Service explained that a lot of the work on the C&I was generated at the national and international levels, and so it's no surprise that the C&I are applicable at those levels. The C&I, even though they are not perfect, can help us understand forest management and sustainability more generally. They also help provide a common base of information that prevents us from having to reinvent the wheel each time we have a discussion. The U.S. implementation of the Montreal C&I in the *National Report on Sustainable Forests—2003* has already shown us some important trends, including:

- For about 100 years there has been no net change in U.S. total forest area, but there always is forest movement, with forests converting to urban land and agricultural land becoming forested.
- Some age classes and successional stages have diminished and may be threatened, especially some in the early seral stages.
- All forms of recreational activity are increasing while the amount of forestland available to public for free access is decreasing, largely due to changes on private lands.
- Eighty-eight percent of species occupy their historical ranges; 12 percent do not.
- About half of all land is within 100 meters of a forest edge. About half of all forest points are in a block of five acres or smaller.

Even if the *National Report's* focus is at a larger scale than what people need on the ground to make day-to-day decisions, they provide a good context and overview of how we think about forests.

Major topics in the discussion that followed included:

- The *National Report* and Oregon state reports had little information about non-traditional forest products, which are critical to many communities. We need to learn more about them and their connection to communities. We have learned that harvesters of these products are having difficulty with the C&I process. We do not have confident statistics about the contribution of these products to the economy, but it is not insignificant.
- There have been some small discussions of a procedure and set of checks and balances for National Forests similar to those used in certification systems. A Forest Service analysis concluded that there would be great value in moving toward a third-party audit by a non-Forest Service. In doing so, the stakeholder community could move from a dialogue about finding fault to one about areas of agreement and moving forward. A participant noted that none of the leaders of the certification systems wanted the USDA Forest Service to use theirs in the national forest system, but they see the value in the USDA Forest Service using its own standards applied in a third-party audit.

Regional Scale

Connie Carpenter, sustainable forests coordinator for the USDA Forest Service, Northeastern Area (NA), State & Private Forestry, said that state foresters decided the C&I were worth examining more closely,

based on their worldwide appeal. They joined with the NA in an initiative to develop and use regional indicators.

The NA has 413 million acres of forest, 78 percent of which is privately owned. The region's core indicators include data that people often include in their assessments, and so compiling the data is a service to the agency's partners and stakeholders. They are committed to comprehensive monitoring and assessment at multiple scales every five years.

During questions and answers, the following points were made:

- The wording for the regional indicators differs from the C&I. The state foresters looked at the information available for 18 base indicators and made a commitment, using wording that explicitly states exactly what they would be providing. They may be restated in the future as technology and capacities change.
- Many data samples come from a census of manufacturers and the Forest Inventory and Analysis. Data originating in the states is relatively more limited. The process tried to look at data that were already available and to correlated across states. A data gaps committee is working on the places where we need more work.
- Because the indicator list began with the C&I, the state foresters were not looking for people to help decide what indicators should be. The region is committed to enabling people to use the data in whatever way they wish. The idea of broadening the process beyond the NA and the state foresters will be queued up as they prepare comprehensive reports. They will produce a manual for state forest planners on how they might use this data.

State Scale

Kevin Birch of the Oregon Department of Forestry said that his organization has used C&I for almost six years, trying to incorporate the concepts throughout the Department's business. This attempt culminated in the publication of the *2003 Forestry Program for Oregon*. He has found sustainability to be a unifying theme that resonates with the public, and is using it as a theme that reduces confrontation and brings people together. He said that the criteria provide a set of goals and a framework for issues of importance. Oregon's approach was developed with broad input and is comprehensive in its scope. The policy developed three levels of forests: reserve, multi-resource lands, and wood production forest lands that are mainly private.

The discussion that followed Mr. Birch's presentation covered the following topics:

- Even though Oregon has worked on criteria for almost six years, the process is still in its infancy and has not yet set measurable objectives. The question is whether or not the state can ever reach agreement on what they are. Two indicators that are tied to the Oregon Benchmarks may be used to set reference points.
- Oregon tracks the timber harvest over time and would like to compare harvest to growth. However, the department needs more specific information to be able to do that properly.
- One participant said it seems that state and regional agencies are willing to use any tool to attempt to resolve conflict, even if the tool is not effective at that level. He also cautioned against confusing certification with sustainability.
- The impetus for using C&I came from the state legislature, which after the spotted owl conflict in 1990, wanted information on the cumulative effects of management on the forest. The state tried to use its own set of indicators, but no one liked them. They did not represent a broad enough set

of values. C&I gave the state a broad set of values that enables them to talk about more than just a few issues.

- Depending on scale of data collection, the Montreal C&I are very useful. At the landscape and ecoregional levels they are appropriate and provide a good amount of information.
- The Montreal C&I are not valuable just because national people are using them, and despite what some may think, an international effort is not driving their use at the local level. Some of them offer a common, consistent framework for comparing regional conditions with national conditions.
- The leaders of state and regional efforts would like to integrate C&I-based reporting with the work of federal agencies. A goal is to have a better relationship that allows the exchange of data, similar to what the USDA Forest Service's Northeastern Area has developed.

Local Scale

Pam Wright of the USDA Forest Service's Forest Monitoring Institute and Nancy Lankford, Mt. Hood National Forest, described how the Local Unit Criteria and Indicators Development (LUCID) pilot used C&I to help national forest and grassland managers evaluate the quality of management on the ground and progress toward their planning goals. Previously, monitoring focused on implementation, which is important but insufficient for understanding progress toward larger goals.

LUCID was informed by the national and international dialogue, which helped provide a context for its work. To develop C&I for the forest management unit scale, a team of people performed a gap analysis of indicators (using existing systems), both in terms of what they covered and their relevance to scale. The project then gave a draft set of indicators to the pilot forests. The forests' staff did not agree with the assumptions behind indicators and rebuilt a framework in collaboration with universities that was more consistent with systems thinking in that area. The reconstructed C&I had more meaning for each of the forest interdisciplinary teams.

Ms. Wright and Ms. Lankford said that several learnings emerged in the LUCID process. First, while there is a strong conceptual relationship between scales, some things are not visible at certain scales, and in some cases, what is measured under a criterion may differ at one scale from another. Also, if criteria are neutral and non-directional, at some point you have to ask about sustainability, which is a directional concept. Third, the discussion of reference values is really where "the rubber hits the road." Finally, there are definite trade-offs between top down and a bottom up approaches. A top down approach is faster and imposes consistency and can apply thinking that has been tested in other locations. The bottom up approach takes longer, but allows organic learning to occur, which LUCID found beneficial. This allows re-examination of other existing frameworks, which produces more rigorous criteria at the individual forest scale.

Breakout Session II: Use of Criteria & Indicators in the West

In four groups of 12 to 20 participants, facilitated discussions explored how to determine whether goals are being reached, why the Montreal C&I framework is or is not important to measuring progress, the relevance of the C&I in the West, and the utility of the *2003 National Report on Sustainable Forests* at sub-national scales. Collectively, the four groups produced the following ideas:

Determining/measuring whether you are reaching established goals to preserve what is important to you:

- The term "goal" is finite, whereas use of the C&I needs to be a process with checkpoints—a continuum that never reaches a conclusion or end. The Oregon project, for example, does not

describe a destination, but rather an evolving, iterative process. A goal is an overarching, value-based statement of direction. The next step down is an objective, which changes over time and is measurable. However, you want to avoid the trap in which maintaining the activity aimed at meeting the objectives becomes more important than reaching the objectives.

- There should be a balance in integrating values into the process. Indicators should be in place to reflect everyone's values, and reference values for indicators should be established early in the process.
- Rather than using current indicators, such as the number of visits to forests and the quantity of medicinal plants, we should allow people to determine and be involved in the process of selecting indicators so that their desired outcomes can be achieved. For example, local communities may value education and kid camps as tools to achieve public ties to the land. This creates public buy into the process.
- Indigenous knowledge and experiential knowledge are valuable at the local level. Science-based indicators can be aggregated up to the national level.
- The Montreal C&I are important at different scales and need to be reframed at each level. Some national C&I are relevant at the local level; for example, carbon trading is important when there is monetary compensation for carbon trading credits. Managers can be informed by looking at a broader scale to see how their actions relate and compare to other conditions and actions, and by looking at a finer scale, to better understand the impact of their actions.
- Facilitated discussions are needed both top-down and bottom-up to develop buy-in and trust. Too strong of a national approach suffocates local efforts. Current tools are too top-down.
- Multi-party monitoring can be a way to incorporate values of diverse interests. The process should be inclusive, but should not stop or lose credibility if people choose not to participate. Monitoring needs to occur at different scales, across ownerships, and in a landscape context.
- There is a need to target education programs at environmental groups working at multiple scales.

One group discussed the type of measurement used at specific locations or by particular entities.

- On the Tongas National Forest, all forest resources are included when evaluating sustainability. The best available science is used in a transparent, public process involving a lot of listening.
- The 2005 Comprehensive Conservation Wildlife Plan presents a good opportunity to integrate Criteria and Indicators.
- The Oregon Biodiversity Assessment uses a scale of one to ten for the intensity of management. Once the land is coded, it is possible to integrate the assessment with other information on vegetation and use it as a tool for evaluating the level of management and attention that should be applied to different land types.
- The Yakama Nation uses a variety of tools to measure progress toward goals, with the approach depending on whether the goals are short- or long-term. Timber serves as a gauge, with continuous forest inventory performed on plots. Computer models project future conditions, increasing the ability to evaluate progress toward the Tribe's goals. They also monitor fish and wildlife habitat. Cultural resources, which are kept secret, are not as well documented.
- On reservation forests, factors that need to be considered in the planning process include confidentiality, responsiveness to Tribal Council requests, cultural and traditional concerns, and the Endangered Species Act. Actions are measured against the goal of preserving and protecting the forest for the next seven generations. Funding is lacking for programs that are not included in some state and federal appropriations.
- The USDA Forest Service monitors at various different scales for such things as whether forests are meeting desired conditions, the implementation of legal and partnership activities, and collection of data. The C&I are used to organize the data.

Why using the C&I is important to measuring progress toward goals:

- The Montreal C&I take the three spheres (economic, ecological, and social) of sustainability into account. They allow measurement to be fairly exhaustive, beyond just the timber harvest. The framework also helps make connections between various indicators.
- The Montreal C&I provide a common language for discussion that improves understanding across diverse interests. They also provide consistency when federal or state agency personnel change.
- At sub-national scales, using the Montreal C&I avoid having to reinvent the wheel, and many existing data and measurement systems can be used with the Montreal C&I. For example, wildlife and plant data is scalable from the county to international level. Linking local efforts to this external process lends credibility to local knowledge.
- The Montreal C&I can provide a baseline assessment for making progress. They also can be used in defining forest health. Monitoring can provide the safeguards and evidence to provide feedback for decision-making, fostering adaptive management and building trust. It is a path to accountability.

Why using the C&I is not important to measuring progress toward goals:

- The process is technical and expensive.
- Its capacity to reduce conflicts is unproven.
- Particularly for social and economic indicators, the data is of questionable utility. There is concern about confidence levels for all of the data.
- The intent of Criterion 7 is not clear. What are the social dimensions of those indicators? How are politics and equity addressed?
- When the framework concept is presented to a community group it is overwhelming. The message should be delivered in smaller doses. The way the information is delivered is critical.

Relevance and usefulness of the Montreal C&I in the West and potential process for applying them:

- The social indicators need to be improved to be more relevant and more reflective of social sciences.
- The C&I will be meaningful only if the process of using them builds trust and public buy in. The public lost trust in federal agencies 25 to 30 years ago. Since then, as numerous approaches have been attempted to regain trust, and as each has encountered local resistance, it has been discarded for a new one.
- Sustainable forests only work if everything else is sustainable. At the local level, sustainability is needed beyond the forest.
- The C&I are not relevant if they are not tied to other processes, such as forest planning, university-based efforts.
- Information generated by applying the C&I should be connected to wildfire prevention and adaptive management decisions. This would help to increase confidence and build common ground among stakeholders.
- Sixty-seven indicators cannot be measured without a national investment in monitoring. Local communities will not monitor something that does not have local relevance. The issue is the relevancy of the data to the people with money. Oregon's forest industry provided funds to collect data and complete Oregon's first approximation report.
- The federal role in creating an inclusive process, and whether federal agencies have the capacity to do that, is not clear. It may not be worthwhile for them to engage in such a large and far-

reaching process, given their limited financial and human resources. The cost of developing a core of indicators should be compared to other costs.

Utility of the National Report for planning, assessment, and decision-making at sub-national scales:

- The *National Report* is a credible source of information, and some of it is useful at the regional level. It allows us to see the ramifications of national and regional management decisions. However, you need to know your goals, including policy goals, to make the C&I relevant. Also, to have value, the report needs to be clearer about the basis from which progress can be measured, clarifying whether the reference condition is pre- or post-settlement. The report does a good job of showing both what we know and what we do not know. It misses many important forest health issues (e.g. livestock impacts, roads) and fails to discuss forest health in the larger context of ecosystem health. It is a highly production-oriented approach. The ecological data would not stand up to peer review.
- The *National Report* should not be used for policy. Policy should be decided at multiple levels and informed by C&I. By revealing data gaps, the *National Report* can help set priorities for allocating resources.
- There should be a mechanism for many voices to interpret the data. C&I and their interpretation are related, integrative, and iterative. The *National Report* contains strong value statements about the meaning of the data.
- The criteria are robust at the state level and at multiple scales, but indicators vary by scale and may need to be adjusted to be relevant at a sub-regional scale. Several participants agreed that C&I data disaggregate accurately to a sub-national level, but they differed in their opinion of what that level was (i.e. regional, local, etc.).
- Data should be collected for local planning but should not be aggregated to the regional level. The majority of issues are playing out at sub-national scales, and those issues can be masked or distorted if data are aggregated to a scale that is too large.
- It is uncertain whether the *National Report* will be a tool to tell how our forests are doing. The national scale may be the wrong scale. We may need to focus more at the local and other scales to really gauge forest health. There is concern that national and county data do not disaggregate to the local level. County data may not reflect the rural picture within a county well enough for practical, project- and local-level application. The document is too broad, and not specific enough to be useful to people trying to understand issues at the local scale, but it could be used as a model for developing local reports on forests.
- The C&I process addresses the need for public trust. It is hard to measure public trust and justify the cost, but the C&I process is worth the effort.
- The process brings federal land managers together to discuss implementation, and the *National Report* provides a platform for such dialogue.

Plenary Session – What Does All of This Mean to You?

In a closing discussion that asked the participants to share any last thoughts on their minds, several major issues came up.

Overcoming Jurisdictional Boundaries

An ecosystem approach within the national forests is insufficient. Especially for migratory wildlife species—either neotropical migrants or elevational migrants—it is critical for all of the forest values to be sustainable across jurisdictional boundaries. No one from the Bureau of Land Management participated in the meeting, but realizing the values of the C&I depends upon coordinated efforts across jurisdictions.

Also, states must be fully integrated. Every state has to complete a comprehensive wildlife conservation plan by fall 2005, and even though they are having the same discussions that took place here, the overlap among them is weak.

A USDA Forest Service official said he would ask the state fish and wildlife agencies whether the C&I framework would be useful in that process. In addition, the Roundtable Network of the leaders of the four roundtables (forests, rangeland, water, and minerals) is looking at cross-sector issues at conceptual level. Its work is linked to the Council on Environmental Quality's efforts to create a set of national environmental indicators.

Engaging Local Communities

Although this process is useful, the way that it is introduced to local communities is critical to getting local buy-in. After the principle is applied, it's the communities in and adjacent to the forests that will be left. They feel disengaged and disempowered. To them, it doesn't matter where the C&I came from or what they're called—what we do with them is more important. The C&I present an opportunity to implement something with a scientific basis that the public can understand, but people have to feel they are involved on the ground. Otherwise it will be perceived as another thing handed down from Washington, DC. If county commissioners from every county in the region were here, this process would move faster on the ground.

It is difficult to get local people from a region as large as "The West" together, and many issues are subregional. Some in the West would like to pursue subregional workshops, possibly more aligned with USDA Forest Service regions.

If C&I are going to take hold, the process will need a champion. Using a common framework has advantages. However, some are not sure that the USDA Forest Service regional model is the most appropriate. The region might first want to see commitment from state forest services and the county level. That said, government does not have to do everything—an organization on the ground could facilitate innovation and change. For multi-state subregions, it would be helpful to get states together and talking to one another.

What is most important is having something to tie to, a framework of organizations that counties and communities can join. The participation of interested local entities could build some sort of momentum. A lot of information on the C&I needs to be generated from the ground level, and so there must be clearly articulated incentives for communities to participate in the process.

Implications of Criterion 5

In the late 1980s and early 1990s, climate change was coming to the fore, and the notion of global carbon cycles and climate change was important to some of the countries participating in the Montreal Process. To some extent, Criterion 5 was a bit of an afterthought compared to the other criteria. The framers attempted to state it neutrally as a policy matter, but still track it as a critical function of the ecosystem. In the *National Report*, information on Criterion 5 is a recasting of information on Criterion 2 in terms of productivity and biomass measures. It often is mentioned as the one criterion that is almost exclusively national and international in importance, but in some situations—such as the introduction of a carbon credit market—local entities may make decisions based on that sort of information.

Closing Remarks

Joel Holtrop, Deputy Chief for State and Private Forestry, USDA Forest Service, and RSF Co-Chair offered comments on why the workshop was important to him. Soon after assuming his position at the USDA Forest Service, the Chief asked him to take organizational leadership for sustainable development—a huge job. In that role, he works around the globe at all scales, and sustainability ties into everything the agency does, touching all aspects of its work. He realized he couldn't do it all and sought a broader commitment to this effort within the agency. The result is a leadership team: Pete Roussopolous of the Southern Research Station, Kathy Maloney of the Northeastern Area, and Jack Troyer of Region 4. This group represents leadership from the different functional areas within the Forest Service and provides valuable council on sustainable development issues and programs.

Mr. Holtrop said that at the World Forestry Congress in Quebec City, he heard representatives from Argentina, Chile, South Korea, Russia, Canada, and Australia talking about how the Montreal C&I are helping them understand their forest management challenges. He impressed on the group the power of a fairly simple tool and the difference it is making globally. But this workshop has demonstrated the need to make C&I more effective at the local level. He said that if we can learn from the local level, we would discover what we need to do to help local people do their work better.

Mr. Holtrop said that he appreciated Dave Radloff's description of the federal role in pulling together the *National Report*, and he said that he is very comfortable with the role of the USDA Forest Service and the RSF. But the *National Report* is very much flavored by the work of RSF workshops held around the country. The report creates an opportunity to talk about sustainability, and broaden and deepen our commitment at all levels.

At the conclusion of his comments, Mr. Holtrop handed the microphone to Jerry Rose, National Association of State Foresters, and Co-Chair of the RSF. Mr. Rose said that he had heard a lot about scale and agreed that what happens on the ground is what counts. At the national level, we can “grease the skids,” but some might say that we can also “tar the skids.” Input and recommendations for national and international actions can improve our ability to move forward. This iterative approach is critical.

Rose had just finished a paper for the Department of State on decentralization of forest decision-making in the U.S. Counties with a more decentralized approach and more local control are moving toward sustainability more than communities that have less local input. He also said that on federal land issues, communities of place are often left out, while communities of interest are very well organized. Communities of place are less organized around forest issues and more concerned with issues such as education, health care, and transportation. The government needs to increase the involvement of communities of place, and communities of place need assurance that their input will be considered equally to that of communities of interest.

Mr. Rose reminded workshop participants that C&I are a tool to do the job, but not the job itself. They provide a framework for dialogue, common language, and organizing issues. He agreed that the Montreal C&I in particular are a platform that allows people to begin to discuss and create their own C&I.

Rose finished his remarks by saying that sustainability is a pathway, not a long-term target or fixed point. Uncertainties indicate that there is a range of feasible sustainable outcomes, depending on the dynamics and vagaries of nature, emerging science, new technology, markets, and changing social values and preferences over time. The land can produce different blends or mixes of nature's bounty, depending on social choice and the boundaries imposed by biophysical constraints. We need consensus on the blend, based on good biophysical and social science, a transparent process of choosing, and stakeholder involvement.

ATTACHMENT A. GOALS AND OBJECTIVES

GOALS AND OBJECTIVES WESTERN REGIONAL WORKSHOP ON SUSTAINABLE FORESTS Phoenix, Arizona February 3 & 4, 2004

Goal:

To broaden and deepen the dialogue, understanding and the utility of criteria & indicators as a tool in the management of sustainable forests.

Objectives:

Objective # 1 - Achieve a better understanding among Western stakeholders of the opportunities and challenges associated with the goal of sustainable forests. The workshop should:

1. Be oriented towards local, on-the-ground issues (some issues to consider include fire/fuels, invasive species, fragmentation or unmanaged recreation); and
2. Engage local people.

Objective # 2 - Serve as a catalyst and foundation for ongoing dialogue relative to:

1. Increasing cooperation and partnerships among stakeholders;
2. Increasing the level of knowledge about sustainable forest management; and
3. Defining the next steps following the Regional Workshop including identifying:
 - a. Who should be included in the ongoing dialogue; and
 - b. What stakeholders in the dialogue need to know.

Objective # 3 - Discuss and evaluate the use of the Montreal Process Criteria & Indicators as a framework for integrating sustainable forest indicators into ongoing and/or future planning and monitoring activities at different scales. The workshop should foster:

1. Evaluation and feedback on the relevance as well as the usefulness of the Montreal Process Criteria & Indicators at multiple scales.
2. Discussion on indicators of sustainable forests that are specifically relevant to western forests.
3. The engagement of local people on real western forest issues that have local, on-the-ground relevance.

Objective # 4 - Explore and provide feedback on the relevance and utility of the National Report on Sustainable Forests for the assessment, planning and decision making at sub national scales.

ATTACHMENT B. AGENDA

WESTERN REGIONAL WORKSHOP ON SUSTAINABLE FORESTS
Wyndham Phoenix Hotel
50 East Adams Street
Phoenix, Arizona
February 3 & 4, 2004

Tuesday, February 3

- 7:30 – 8:30 a.m. **Registration and Coffee**
- 8:30 – 8:50 a.m. **Opening Plenary Session**
Scott W. Bell, Rural Community Assistance Coordinator R1/R4, USDA Forest Service
Steve Gatewood, Program Director, Greater Flagstaff Forests Partnership
Jack Troyer, Regional Forester for the Intermountain Region of the USDA Forest Service
- Welcome and purpose of the Workshop
 - Context/history of the Workshop
 - Overview of Workshop expectations and outcomes
 - Integration with Greater Flagstaff Forests Partnership
- 8:50 – 9:00 a.m. **Agenda Review**
Sarah Walen, Meridian Institute
- 9:00 – 9:40 a.m. **Presentation and Discussion on US Commitment to Sustainable Forests and the Use of Criteria & Indicators as a Tool in the Management of Sustainable Forests**
Phil Janik, USDA Forest Service - Retired
- Overview and history of US commitment to Sustainable Forest Management
 - Montreal Process Criteria & Indicators as a framework
 - Role of the Roundtable on Sustainable Forests in the domestic application of Criteria & Indicators and the National Report
- 9:40 – 10:00 a.m. **Sustainability and Establishing Values and Goals at Multiple Scales**
Tom Hoekstra, Director, USDA Inventory and Monitoring Institute
- Importance of understanding values at all scales in establishing the goal of sustainable forests
 - Origin of using Criteria & Indicators at the local level
- 10:00 – 10:15 a.m. **Move to Breakout Session I**
- 10:15 – 11:30 a.m. **Breakout Session I – Sharing Perspectives on the Values and Goals of Sustainable Forest Management**
Discussion will be structured around the following questions.
- Relative to forest sustainability, what values do you want to preserve - *Why is it important to sustain forests?*
 - How would you sustain forests to preserve these values - *What goals have you or could you set to preserve these values?*

- How might these values and goals apply at different scales of application?

11:30a.m.-12:15p.m.		Lunch
12:15 – 12:45	p.m.	Plenary – Round Robin – Reflections on Breakout Session I Learnings
12:45 – 2:15	p.m.	<p>Panel - Presentations and Discussion on Case Studies on Sustainable Forest Management in the West <i>Gary Larsen, Forest Supervisor, Mt. Hood National Forest, The Quest for Sustainability and Local Unit Criteria & Indicators Development (LUCID) Project</i> <i>Steve Gatewood, Program Director, Greater Flagstaff Forests Partnership</i></p> <ul style="list-style-type: none"> ➤ Presentations ➤ Questions & discussion
2:15 – 2:30	p.m.	Break
2:30 – 4:00	p.m.	<p>Panel - Presentations and Discussion on Case Studies on Sustainable Forest Management in the West (continued) <i>Diane Snyder, Wallowa Resources, Community Forestry Partnership</i> <i>Edwin Lewis, BIA Forest Manager, Yakama Agency, Forest Health</i></p>
4:00 – 5:00	p.m.	<p>Plenary – Reflections on Case Studies <i>Sarah Walen, Meridian Institute</i></p> <ul style="list-style-type: none"> ➤ What can we learn about Sustainable Forest Management from these case studies?
5:00	p.m.	Adjourn for the Day
6:00 – 7:30	p.m.	No Host Reception
Wednesday, February 4		
7:30 – 8:00	a.m.	Coffee
8:00 – 10:15	a.m.	<p>Panel - Use of Criteria & Indicators and Sustainable Forest Management at Different Scales in the West <i>Dave Radloff, USDA Forest Service</i> <i>Connie Carpenter, Sustainable Forests Coordinator, USDA Forest Service, Northeastern Area, State & Private Forestry</i> <i>Kevin Birch, State of Oregon Department of Forestry</i> <i>Pam Wright, Forest Monitoring Program/LUCID Project Coordinator, Inventory and Monitoring Institute/METI Inc., USDA Forest Service</i></p> <ul style="list-style-type: none"> ➤ Presentations on using criteria & indicators at different scales for different purposes ➤ Relevance and usefulness of the National Report for assessment, planning and decision making at these scales. How can/should its relevance and utility be improved? ➤ Questions & Discussion
10:15 – 10:30	a.m.	Move to Breakout Session II

10:30a.m.–12:30p.m. **Breakout Session II – Use of Criteria & Indicators in the West**

Discussion will be structured around the following questions.

- How do you determine/measure whether you are reaching the goals you have set to preserve what is important to you? Is there a reason for you to measure at different scales?
- Why is/isn't using criteria & indicators as a framework to measure progress towards your goals important?
- What is the relevance and usefulness of the Montreal Process Criteria & Indicators in the West? If they are relevant, what process might be used to apply Montreal Process Criteria & Indicators in the west?
- What is the utility of the National Report for planning, assessment, and decision-making at sub national scales?

12:30 - 1:15 p.m. **Lunch**

1:15 – 2:00 p.m. **Plenary Session – Reflection and Discussion on Breakout Session II Learnings**

2:00 – 2:50 p.m. **Plenary Session – What Does All of This Mean to You?**

Tim Mealey, Meridian Institute

- What have you learned from this discussion?
- What are you going to do with this information?

2:50 – 3:15 p.m. **Closing Remarks and Next Steps**

Jerry Rose, National Association of State Foresters and Joel Holtrop, USDA Forest Service, Roundtable Co-Chairs

3:15 p.m. **Adjourn**

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