

Work Plan

Jackson Demonstration State Forest Advisory Group

January 22, 2009

The Primary purpose of this Work Plan, which will be revised as progress is made, is to guide the work of the Jackson Demonstration State Forest Advisory Group during the Initial Implementation Period for the 2008 Jackson Demonstration State Forest. The key task of the Advisory Group during this time is to review the Management Plan and to make recommendations to the Department of Forestry and Fire Protection and to the Board of Forestry and Fire Protection regarding potential changes to the Plan

1. Mission and Duties

The Mission and Duties of Jackson Demonstration State Forest Advisory Group (JAG), are outlined in its Charter (summarized in Appendix 1). Key components relevant to the Work Plan include providing advice and recommendations to the Director and Board regarding:

- Issues relevant to the review of the Jackson Demonstration State Forest (JDSF) Management Plan for possible changes during the Initial Implementation Period.
- Ongoing implementation issues.
- Policy matters relevant to JDSF.

2. Approach

Use charter to help direct work.

Use management plan to direct work.

Clarify uncertainties in mission and duties.

JAG has already sought clarification on specific wording regarding the relative role of JAG and JDSF staff in carrying out the Recreational duties.

JAG has discussed but not yet forwarded clarifying language on other aspects of the duties.

Use Management Plan as basis for review and recommendations.

The JAG should have a “clean slate” for making recommendations to the Department and the Board, while at the same time consider the existing policy documents for the Forest (i.e., legislation, Board policies, and the Management Plan).

Form committees to lead activity in certain endeavors.

Develop framework to guide Work Plan.

Identify background material and provide external presentations to inform discussion.

Identify and receive input from stakeholders.

Operate as consensus-seeking body.

Respect diverse values of JAG and the public.

3. Goals and Principles

To review Management Plan goals, JAG began drafting its own draft, independent goals using the Management Plan’s stated goals as a foundation. Currently, these are not in priority order (Appendix 2):

- Research and Demonstration

- Education and Outreach
- Watershed and Ecological Processes
- Timber Management
- Recreation and Aesthetic Enjoyment
- Information, Planning, and Staffing
- Minor or Non-Timber Forest Products
- Property Configuration
- Landscape Allocation

Additional potential goals may include: forest restoration, protection.

JAG is reviewing the Management Plan objectives and is identifying forest management principles to guide review and recommendations.

4. Framework

To provide an objective, systematic, and rational basis for review and recommendations JAG is developing an over-arching framework based on goals and principles. The framework will relate policy, science, implementation, and cross-cutting issues and provide a basis for identifying committees.

5. Committees

Initially, eight Committees have been established (Appendix 3). Membership will likely fluctuate depending on individual interests and availability. Committee tasks identified in Appendix 3 will be modified as each Committee becomes better informed and topics identified. The initiation, duration, and completion date for each Committee will be sequenced as work progress.

Overall, the Committees are charged to:

- 1) Review and outline priority topics using the Management Plan as a base document.
- 2) Identify gaps in the existing Management Plan that need to be considered.
- 3) Identify possible implementation issues.
- 4) Identify possible policy matters.
- 5) Identify possible external sources to provide needed base information.

The initial Committees are:

Work Plan Committee (Helms as Chairman) -- Coordinate, facilitate, and integrate JAG's work. Ensure timeliness and coordinate the development of the final report prior to the conclusion of the Initial Implementation Period.

Recreation (Taylor as Chairman) -- Provide initial input to JDSF on user needs, particularly in relation to THPs being considered during the Initial Implementation Period, recreation elements of the Management Plan, and the process of establishing a Recreation User Group.

Landscape (Valentine as Chairman) -- Broadly review the allocation of land use on JDSF and desired mix of forest conditions over time.

Research and Monitoring (Liquori as Chairman) -- Develop a framework for research and demonstration. Allocation and administration of mission-based-research vs. ad hoc requests for proposals. Types of monitoring protocols include compliance, effectiveness, validation, and status/trends.

Economics (Melo as Chairman) -- Review and comment on current and projected revenue flows, operating costs, cash flow, and funding needs for JDSF, as well as the broader economic implications of the management of JDSF.

Operations (To be Assigned) -- Review specific issues relating to overall management and implementation of the Management Plan including: herbicides, road plan, staffing, facilities, property configuration, minor forest products, wildfire and prescribed burning.

Outreach (To be Assigned) -- Review outreach for research, demonstration, education, recreation, and forest management in general.

Timber Harvesting Plan Review (chairperson not yet designated) – Take the lead role in reviewing proposed timber harvesting plans (THPs), including conducting field tours. Report back to full JAG with information and recommendations. The full JAG will be responsible for making recommendations on proposed THPs to the Department and Board.

Committees will commonly pursue their work between JAG meetings. Each JAG meeting will provide Committee breakout sessions and time for reporting back for JAG input and guidance.

6. External Input and Consultation

Based on committee recommendations JAG will, to the extent feasible, provide source materials and schedule presentations from external sources that will provide needed information to enable JAG to make informed reviews and recommendations.

Preliminary potential presentations/consultations may include:

JDSF staff -- Existing information on stand structure and stand conditions.

Pacific Southwest Experiment Station -- Caspar Creek study now and in the Future.

Board of Forestry and Fire Protection -- Monitoring Study Group.

University of California Coop Forestry Extension -- Small and large redwood landowner needs for research/demo.

Adjacent Landowners -- Opportunities for partnership and collaboration with JDSF.

University of California, Cal Poly San Luis Obispo, California State Universities, Pacific Southwest Experiment Station -- Management of research and demonstration forests.

Western States Research Forest Managers – Information on how other Western states operate research forests.

Department Inventory Review -- The Department intends to solicit a peer review of existing JDSF timber and biological resource inventories. JAG requests an opportunity

to review and comment on the draft call for peer review and the outcome of peer review results.

7. THP Reviews -- Ongoing

JAG will review all Timber Harvesting Plans (except where specific exclusions have been made per the Management Plan) during the Initial Implementation Period, commonly including field visits. The reviews will primarily focus on ensuring that each THP (including monitoring and tree marking) is consistent with and meets the intent of Initial Implementation Period guidelines:

- Thinning or selection harvesting only.
- Maximum 30% conifer basal area reduction.
- Maintain or increase conifer quadratic mean tree diameter.
- Avoid sensitive areas and areas with large trees and/or older second-growth.

JAG will also recommend that economic viability of each timber sale be evaluated and that major future options not be precluded. Map Figure 6 in the JDSF Management Plan shows the location of intended THPs.

Brandon Gulch and Camp Three -- THP prescriptions were developed by JAG and submitted to the Director on August 8 and September 15, 2008, respectively. The THPs are being amended and the timber stands will be re-marked and recruised by the Department to reflect the new prescriptions. Several JAG members reviewed the sample marking of the Brandon Gulch harvest in December 2009 and found that it met the new prescription.

14 Gulch – A field visit was conducted on October 4, 2008, and no further JAG review is anticipated.

Dunlap North -- JAG supported this THP after field inspection on Nov. 15 2008, and recommended that CAL FIRE consider economic viability of the timber sale before moving ahead with it, due to current timber market conditions and the species mix and small tree size resulting from complying with the Initial Implementation Period harvest restrictions.

Hare Creek -- JAG toured this THP on Dec. 13, 2008, and made initial recommendations for its submission on January 12, 2009. The JAG is examining economic viability of the sale, due to current timber market conditions and the cutting of small trees to maintain compliance with the quadratic mean diameter element of the Initial Implementation Period harvest restrictions. Further follow up on economics of the timber sale is planned.

North Fork Spur – The JAG toured this THP on Jan. 13, 2009 and recommended its submission as prepared.

The following proposed THPs are expected to be submitted to JAG for review in the first half of 2009:

South Whiskey Springs -- February to March 2009
South Fork Caspar Creek Research -- February to March 2009
Dunlap South -- March to April 2009

8. Timeline

The overall timeline for sequencing Committees and development and completion of the committees' duties is shown in Appendix 4. Each Committee will develop its tasks and identify its own timeline. The initiation, duration, and cessation of Committees are expected to vary to enable the work and deliberation of some committees to inform and provide input to other Committees.

The attached timeline is expected to be constantly revised as needed.
Each Committee will develop its own draft content for the Final Report.

The overall timeline is for JAG to complete the first draft of its Report by the end of June, 2010, and to submit its final Report to the Director and Board by early January, 2011.

9. Appendices

1. Mission and Duties as outlined in Charter
2. Goals and Principles (In Progress)
3. Initial Committees and Tasks
4. Work Plan Timeline (In Progress)

Appendix 1

JAG Charter and Duties

Mission

The mission of the Jackson Demonstration State Forest (JDSF) Advisory Group (Advisory Group, JAG) is to provide advice/recommendations to:

- The Board of Forestry and Fire Protection (Board) and Director, Department of Forestry and Fire Protection (CAL FIRE) regarding issues relevant to review of the JDSF Management Plan for possible changes during the Initial Implementation Period.
- Director/CAL FIRE and the Board regarding ongoing implementation issues
- Board and Director/CAL FIRE on policy matters relevant to JDSF.

Duties

- A. During the initial implementation period (not to exceed three years) the Advisory Group shall provide input on the following:
1. Desired future forest structure condition goals for the Forest and the forms, amounts, and spatial designation of silvicultural treatments to be applied to attain those goals.
 2. Long-term goals for a wide range of forest structures, including but not limited to:
 - a. The extent and general location of areas to be dedicated to late seral development and older forest structure zones, where timber production will be secondary to habitat development.
 - b. The extent and general location of areas to be dedicated to old forest structure zones (OFSZs). The OFSZs will maintain or develop key old forest features. The OFSZs will be available for timber harvest.
 3. The Management Plan's approach to (a) protection residual old growth and (b) restricting the extent and conditions under which herbicides may be utilized to control native hardwoods.
 4. The process of conducting a recreation users survey, establishing a recreation user group, and developing a new recreation plan for the Forest. This plan would indicate the desired extent and location of recreation areas, corridors, roads, trails, and facilities that will be managed to enhance the full spectrum of appropriate recreational opportunities given JDSF's management goals.
 5. The need to modify other elements of the Management Plan, as requested by the Director.
- B. On an ongoing basis:
1. Review of ongoing implementation of the Management Plan, as requested by the Director.
 2. When requested by the Director of Board, provide periodic recommendations on forest management policies and the Management Plan.

3. Review and comment on proposed even-aged harvesting.
 4. Provide advice to the Director, CAL FIRE staff, or the Board on other specific issues as determined by the Director, CAL FIRE staff, or the Board.
- C. JDSF Advisory Group responsibilities defined in the JDSF Forest Management Plan are hereby incorporated by reference.
- D. The JDSF Advisory Group will inform the Demonstration State Forest Advisory Group (DSFAG) on the effectiveness of the implementation of the JDSF Management Plan.

Appendix 2

Proposed JAG Goals for JDSF

(Draft; subject to future JAG revision)

- 1. Research and Demonstration** Improve the amount and quality of information concerning economic forest and timber management, forest ecosystem process, watershed processes, performance of forest protection measures, that is available to the general public, forest landowners, resource professionals, timber operators, the timber industry, and researchers.
- 2. Education and Outreach** Engage the public and community about the forest's research and demonstration activities through education, outreach, and recreation.
- 3. Watershed and Ecological Processes** Promote and maintain the health, sustainability, ecological processes, and biological diversity of the forest and watersheds.
- 4. Timber Management** Manage the forest on the sustained yield principle defined as management which will achieve continuous yields of high-quality timber products that contribute to local employment and tax revenue consistent with: a) environmental parameters related to watershed, wildlife, fisheries, and aesthetic and recreational enjoyment and b) providing a diverse, dynamic matrix of forest habitats and seral stages for research and demonstration.
- 5. Recreation and Aesthetic Enjoyment** Plan for and provide enhanced levels of low-impact recreational opportunities that are compatible with forest management objectives and healthy ecological processes consistent with historic recreational use characteristics and allowing for engagement of recreation user groups.
- 6. Information, Planning, and Staffing** Develop, maintain, and update management plans and other planning documents and processes. Manage and support the information and staffing needs of all JDSF programs. Communicate with the public and actively seek their input regarding management of the Forest.
- 7. Minor or Non-Timber Forest Products** Maintain a program that provides an opportunity for the public and small businesses to purchase diverse forest products.
- 8. Property Configuration** Improve the boundary of JDSF to facilitate management logistics and increase demonstration and research opportunities.

Appendix 3

Work Plan for JAG Committees

Compiled by John Helms, Mike Liquori, and Russ Henly from October, 2008,
JAG Meeting Outputs

October 16, 2008

Work Plan Committee

Facilitates JAG organizing its work, learning the content of the current Management Plan, evaluating the Plan, getting the JAG the information it needs to move forward with its tasks, and coordinating the development of the JAG's final report at the conclusion of the Initial Implementation Period.

Committee Members: Helms (chairman), Taylor, Melo, Anderson
Staff: Jameson, Henly

Specific areas to address:

- Ensuring committee integration and Work Plan development/completion
- What **is** in the Management Plan?
- How can we better integrate CAL FIRE's information and updates in the JAG process in a way that does not use unnecessary staff work time?
- How do we stay informed about the economics of JDSF (see also Economics Committee)
- What is the feedback loop to ensure that JAG recommendations are implemented?

Landscape Committee

Reviews and develops recommendations on landscape allocations (Management Plan Map Figure 5 and related Plan elements such as found in Chapter 3) and desired mix of forest conditions over time.

Committee Members: Valentine (chairman), Bailey, Porter, Gill, Jani, Perkins
Staff: Marc

Specific areas to address:

- What input variables inform landscape scale allocations?
- What are appropriate landscape accounting units?
 - Stands
 - Watersheds
 - Compartments
- How do we allocate lands **now** for future landscape goals?
- How much do we need for a dynamic mix of forest or stand types?

- Allocation of proportion of land to various silvicultural approaches and management objectives (needs input from Research Committee)
- What kinds of age class structures meet the needs of the 1100 small forest landowners (need input from the Research Committee)?
- Should hardwood densities “typical of mature conifer forests” be defined?
- Are there actions we can take to make a significant difference to the viability of regionally diminished flora and fauna (also applies at site-specific level)?
- Is the calculation of Option “a” or SYP adequate for the 100-year long-term schedule?
- OFSZ versus Late Seral
- Really, what is the difference between LSF and OFSZ?
- Is there a standard approach to OFSZ/LSF stands for the next 40 years—what distinguishes management and development of these two stand types over this period?

Recreation Committee

Reviews and develops recommendations on current recreation on JDSF, the recreation elements of the Management Plan, the process of establishing recreation user groups and conducting a recreation user survey, and the process of developing a recreation plan.

Committee Members: Taylor (chairman), Braudrick, Tilley

Specific areas to address:

- How do user groups get created and maintain their interest in the recreation program?
- Harvesting: Emphasis on aesthetics
- Detail in Recreation Plan: Improve the recreation experience on the Forest.
- Are there places where habitat needs overlap with human recreational interest?
- Should “low impact and rustic” recreation use be modified to allow for high impact recreation use?

Economics Committee

Reviews and comments on current and projected revenue flows, operating costs, cash flow, and funding needs for JDSF, as well as the broader economic implications of the management of the Forest.

Committee Members: Melo (chairman), Liquori, Tilley

Staff: Eng

Specific areas to address:

- What revenue requirements are needed to meet the desired budget?
- What is the desired budget?
- What is the needed budget?

- Is CAL FIRE able to produce a profit-loss statement, at least quarterly, to track revenues, costs, and cash flow?
- How do we balance revenue generation and our priority goals? What can we afford?
- How do we leverage resources to develop the Science Agenda?

Operational Committee

Reviews and makes recommendations on specific management matters.

Committee Members: Assigned as by Helms (committee chairman), as needed for different items.

Staff: (Ask Marc)

Specific areas to address:

- Herbicide use
- Fire management, including prescribed burning
- Property configuration
- Road Management Plan implementation and its impacts
- Minor forest products, including nontimber forest products

Outreach Committee

Reviews and makes recommendations related to outreach on research, demonstration, education, recreation, and Forest management in general.

Committee Members: Helms (committee chairman), Braudrick

Staff: (Ask Marc)

Specific areas to address:

- What are the informational needs of the public, and who are the stakeholders?
- Education outreach to the public.

Research and Monitoring Committee

Committee Members: Liquori (committee chairman), Helms, Valentine, Taylor, Anderson

Staff: Eng (ask Marc)

Develops the framework for research and demonstration.

First tier areas to address (policy and background related):

- Scales of interest (regional/local, state, national, international)
- Identify key stakeholders and their research and demonstration needs
- External research links
- Coordination/collaboration with other research forests
- What input on research is needed from others (key stakeholders)

- Balance between applied and pure research
- What are we doing now that we should continue/not continue
- Definitions
 - Research
 - Demonstration
 - Monitoring
 - Inventory
- What are the existing data resources for the Forest?

Second tier areas to address (science related):

- Scientific basis for management
- Models (quantitative and conceptual) used as a basis for management
- Working assumptions
- Key scientific and management questions to be researched
- Mission-oriented research

Third tier areas to address (implementation related):

- Administration of research and demonstration
- Role of timber harvest (core information of research or demonstration value recorded on all harvests).
- What's missing in the Plan related to these framework items.
- Research and demonstration staff needed on the Forest
- Research and demonstration facilities needed on the Forest
- Funding needs for research and demonstration
- Internal and external sources of revenue for research and demonstration

Fourth tier areas to address (crosscutting):

- What forest structures in what amounts are needed over space and time to provide varied research opportunities.
- Needs for monitoring and inventory
- Adaptive management system
 - Resource measures
 - Performance targets
 - Resource objective

Note that while the above four tiers are somewhat sequential, the process of addressing all of these areas also will be iterative to some degree.

Appendix 4

Work Plan Time Line

Committee	2008				2009								2010								2011							
	N	D	J	F	M	A	M	J	J	A	S	O	N	D	J	F	M	A	M	J	J	A	S	O	N	D	J	
Work Plan	▪	▪	▪	▪	▪	▪	▪	▪	▪	▪	▪	▪	▪	▪	▪	▪	▪	▪	▪	1	▪	▪	▪	▪	▪	2		
Landscape	▪	▪	▪	▪	▪	▪	▪	▪	▪	▪	▪	▪	▪	▪	▪	▪	▪	▪	▪	▪	▪	▪	▪	▪	▪	▪		
Research/Monitoring	▪	▪	▪	▪	▪	▪	▪	▪	▪	▪	▪	▪	▪	▪	▪	▪	▪	▪	▪	▪	▪	▪	▪	▪	▪	▪		
Recreation	▪	▪	▪	▪	▪	▪	▪	▪	▪	▪	▪	▪	▪	▪	▪	▪	▪	▪	▪	▪	▪	▪	▪	▪	▪	▪		
Economics				1	2	2	2	3	4	4	4	4	4															
Operational																												
Outreach																												
THP Reviews	1	2	3		4	5	6	7																				

Work Plan: ▪ Ongoing. 1. Complete first draft of Report. 2. Complete final Report.

Landscape: ▪ Ongoing.

Res/Monit: ▪ Ongoing.

Recreation: ▪ Ongoing.

Economics: 1. Is CAL FIRE able to produce a profit-loss statement, at least quarterly, to track revenues, costs, and cash flow?

2. What is the desired budget? What is the needed budget?

3. What revenue requirements are needed to meet the desired budget?

4. How do we balance revenue generation and priority goals? What can we afford? How do we leverage resources to develop the science agenda?

Operational: Committee not yet established

Outreach: Committee not yet established

THP Rev.: 1. Dunlap North. 2. Hare Creek. 3. North Fork Spur. 4. South Whiskey. 5. SF Caspar. 6. Dunlap South. 7. Pleiades #4