

NOTES

Monitoring Committee Southwestern Crown of the Continent Collaborative April 21, 2011

Present: Tom Bansak (via conference phone), Travis Belote, Megan Birzell, Jim Burchfield, Gary Burnett, Anne Carlson, Ashley Grant, Jon Haufler, Dick Hutto, Amber Kamps, Joe Kerkvliet, Andy Kies, Andrew Larson, Cara Nelson, Chris Partyka, Keith Stockman, Mo Bookwalter (via conference phone), and Shannon Söderlund taking notes

Meeting Opening

Jim Burchfield opened the meeting and began introductions. The minutes from the previous meeting of the Monitoring Committee of February 24, 2011 were approved without changes.

Jim Burchfield presented the draft agenda to the committee. He suggested reordering the agenda, putting the fifth item – Experimental Framework – at the top. Cara Nelson asked that we expand the discussion of Experimental Framework to a broader level, and specifically discuss our vision for longer term monitoring.

Announcements

Monitoring Coordinator: Cory Davis of Bozeman was offered, and has accepted, the position of Monitoring Coordinator. He begins work on June 6th and will be based on campus in Missoula.

Monitoring Workshop: A national CFLR Monitoring Workshop will be held on June 7th and 8th in Denver. Two representatives from each of the 10 funded CFLR projects are being asked to attend – on FS representative and one non-FS rep. The workshop is being hosted by NFF.

ACTION ITEM:

- **Jim** will check with NFF to see if we can take three people: Jim, Cory, and a FS rep.
- **Keith** will get more detail on the availability of fund to support travel this week.

Doris Duke Grant: Anne Carlson is working with several non-federal monitoring committee partners to prepare a pre-proposal for funding through the Doris Duke Foundation and Wildlife Conservation Society. The pre-proposal, due April 29th, seeks \$250,000 to fund partners' participation in the monitoring committee. The Nature Conservancy will also be partners on the proposal and will use \$100,000 of the funds to transfer Montana Legacy Project lands into public ownership.

Contractors Workshop: The workshop in Seeley Lake last week went very well. Sixty contractors attended on the first day, and 45 attended on the second day. Presenters were able to showcase the SW Crown and talk about upcoming projects. It was very helpful to contractors, and was generally well-received.

(At this point in the meeting, Mo Bookwalter dropped off the conference call due to phone problems.)

Experimental Framework

Jon Haufler introduced his view of our experimental framework, noting that while we have had some great discussions, we have not discussed how we're putting our monitoring strategies and identifiers into a specific structure. Key questions he raised include:

- How are we going to come up with an experimental design?
- How are we going to use plots?
- How do we know how to distribute measurements across a landscape?

Jon is hoping to accomplish a few things through prioritization regarding the identification of goals for the next 10 years, and how we might best stratify treatments for the next 10 years. However, the group still needs to consider which variables we want to stratify around. From these suggestions, we need to identify which ones we want to target, and then say where and how we want to get plots out on the landscape. Then, "control," or non-treatment areas, can be identified. Jon circulated a draft "Experimental Framework Considerations for CFLRP Ecological Monitoring" and suggested that perhaps a sub-committee to develop this framework more completely would be useful.

Jim agreed that this approach to establish a framework that identifies landscape changes would be very valuable. However, we have things we are already committed to measure from our prior objective-driven approach that is based in the legislation and the proposal. Cara noted that we've already laid out some objectives, and so we have a starting point from which we can flesh out an experimental framework. She agreed that we may not all have the same vision on how this would be accomplished. She drew a diagram on the flip chart, with a "small individual project" on one end, a "within CFLRP experiment" in the middle, and an "across the CFLRP landscape" on the other end. This represents a gradient for measurement. Yet the energy and level of activity along this gradient in terms of short and long-term focus has yet to be determined.

Dick Hutto noted that ultimately, we need to have goals that span 10 years. We need to work toward the bigger end of things as time goes on. Cara clarified that small individual projects could be done across the entire landscape. Jon noted that, relative to the design, a small individual project is a funding decision. Yet we need an overall monitoring framework for the CFLRP landscape. We need some kind of design around that or we're just going to have noise. Jim concurred, stating that we need a framework for the whole Southwest Crown area, so that we're always thinking about detecting landscape-level change. We will be able to sample with a landscape frame in mind. Jon also recognized that a concern about landscape-level monitoring is whether we have the potential to actually detect changes on the landscape level: Are we going to be doing enough work on the entire landscape to detect these changes, or are we better off focusing on individual projects and then extrapolating? Andrew Larson stated that we probably are not going to be able to detect changes on a landscape level, but that doesn't mean that we're not able to detect any change. We're going to need to focus on a small level to complement landscape change.

Travis Belote noted that stratification, if small projects are done, can have greater inferences. You gain inference through similar designs across variability within the landscape, which he believed was exemplified in the middle section of Cara's diagram. He observed that decisions are made at the district level, yet these decisions, collectively, need to make sure that there is a common vision across all the Districts. Keith asked for clarification on the intention of landscape level detection that could also inform other collaborative groups in other locations. Is it our intent to identify variables to be used by other committees so they know that they can accommodate similar treatments in their strategies? There will be some projects and identifiers that are outside of this national scope, but we already have national interests that our projects will need to respect and measure.

Amber noted that, in terms of the landscape scale, the Southwest Crown is our landscape, but it doesn't necessarily have to be the only landscape in which changes are detected. As an example, she said, not every watershed has bull trout. Maybe part of this is defining what the landscape is. She suggested defining what landscape means for each of the important issues identified in the legislation. The law says we need to do this on a landscape scale. She added that we could define what "landscape" means for us and then stratify information on different scales. She also suggested that we need to stick to the five major topics, those identified in the existing working subgroups (fire and fuels, socioeconomic, fish/aquatics, vegetation, and wildlife).

Jon noted that the prioritization project is looking at 2013 and beyond. We're going to be looking at the question: how do we set some 10-year goals and locate spatially where those projects are? For example, where are we going to do good things for bull trout? If we can start to identify some of these things, the prioritization group would come back and have reports. That's the long term. We have to come up with ideas for monitoring much sooner.

Anne C. added that, even at this early time, it would be nice to have an accompanying framework. Cara emphasized that we need to have a consistent experimental approach – however, the caveat is the projects for this year. We need to clarify that what we are monitoring this year isn't representative of all we hope to accomplish through monitoring over the next 15 years. Andrew added that we need to make sure we all recognize that this doesn't mean every monitoring project has to fit into a certain mold; some treatments will be put under a stronger lens than other treatments. We could find ourselves, he said, in a situation where we can't say anything. We need to have a specific experimental design that's replicated as a type of framework that puts us in a position to provide some information and learning.

VOTE: The group discussed the strengths of a monitoring program which takes advantage of a broadly applied experimental design. This design would stratify treatments by some ecologically meaningful sites (e.g., habitat types) and replicate treatments within and among sites and include untreated controls. Our inference as to impacts of treatments will be greatly strengthened using this design. The committee voted unanimously to focus monitoring on a smaller set of treatments included in this design, and not spread our resources too thin trying to monitor every project.

Jim asked for volunteers to work on the experimental framework with Jon. Cara noted that she saw the monitoring coordinator as playing a central role in this framework, and thankfully, this is a strong part of the skill set of Cory Davis. She also recognized that there are a series of frameworks (Jon has only been talking about ecological indicators, not social or economic ones). A "series" of frameworks would help in the broader understanding of the different types of treatments. Jon said that the stratification of site differences would be helpful for the vegetation piece. He proposed, through prioritization, that we have 7 different habitat types, based on different combinations of cold/warm. He invited participation, saying that whoever wants to be engaged in this discussion is welcome, yet Forest Service representation will be vital. Keith noted a few things: we should be conscious about myopia – since some things, like our wildlife habitat, might not be as important outside of Montana. Cara proposed that our monitoring coordinator should serve as the chair for this effort, then break it down by treatment type. We're not going to be applying the same monitoring scheme everywhere - where objectives are related to road removal, you'd have something different from fire treatments. Andrew noted that the framework is a major priority, but he didn't think it was at the emergency stage. Amber noted that she would like to get moving on this, and didn't want to wait. Several members of this committee volunteered to participate (along with Cory Davis and Jon), and these were Andrew Larson, Cara Nelson, Travis Belote, Amber Kamps, Andy Keyes, and Joe Kerkvliet.

ACTION ITEM: Jon, Cory, Andrew, Cara, Travis, Amber, Andy, and Joe will work together to articulate an experimental framework for monitoring of CFLR projects based on discussion today.

Cara noted that frameworks will help us to communicate. We need to determine how important it is that we have synthetic learning across landscapes, and perhaps we could dovetail with other objectives from other projects. Jim noted that national indicators would be on the agenda for the next meeting of the monitoring committee.

Coordination of Recommendations and Reach of Monitoring Activities

Jim noted that there were two other issues to address, as the framework discussion took considerable time. He wanted to deal with the issue of transparency on how monitoring committee recommendations are made and communicated, as well as the time-sensitive issue on how we're dealing with the Colt Summit project.

Burchfield stated that there had been only a little bit of discussion on the group's recommendation process and how we want to coordinate among the Monitoring Committee, the Lincoln and Lolo Restoration Committees, the Forest Service, and other entities. The Monitoring Committee has a nice structure of voluntary groups that represent diverse interests. There are also the prioritization and new experimental framework subcommittees. There is also the SWCC, the decision-making body. The question the Monitoring group faces is how to ensure all the groups recognize the capacity and objectives of the monitoring working groups when there are so many moving parts.

Jim recognized that there is a need for much better communication. He asked Megan Birzell on her thoughts, and she said that the full Collaborative Committee feels that they don't fully understand what the monitoring committee is doing or where the budget is going. They want more clarification. Amber said that they want to know: who's doing the monitoring? What monitoring is happening? She cited the weeds monitoring as an example -she wasn't sure how things were happening and wanted to make sure that she and others were up-to-speed. Megan noted that it is difficult to figure out a balance, as the SWCC is not interested in micromanaging. Cara noted that the discussion about the framework is going to be very helpful. Travis said that the committee has been trying; we have expressed in a spreadsheet where weed treatments are going to be implemented. Does the larger collaborative need to approve smaller things? That seems to be the bigger issue.

Jim stated that in the future it will not simply be the SWCC that will be engaged in discussions on treatments and subsequent monitoring, but there will be other restoration committees as well as individual units proposing potential projects. At this point, the Monitoring Committee had been focused on the general questions of what should and could be monitored. After its February meeting, the Monitoring Committee had reported back in writing to the larger Collaborative on its general plans for the use of the roughly \$90,000 budget for FY 10 money – and it would be applied for the seemingly high priority information needs on weeds and social/economic effects as well as a chunk of the monitoring coordinator's salary. However, this allocation of efforts, based on the spreadsheets from the working groups, had not been aligned to specific projects, especially for monitoring important indicators like fuels, and a serious question remains for the group on whether each set of Forest Service-approved treatments, typically packaged via a NEPA approved project, would have its own monitoring plan. Clearly, the group needed to address this and communicate needs or constraints with all the other affected groups, especially the SWCC. He acknowledged that his own limitations had been partly the

cause of a breakdown in the communication efforts. He indicated that this poor communication had not intended to hide anything, but with multiple potential indicators to observe, it has been difficult to come to agreement on how to address with efficiency so many different monitoring demands. Additionally, the monitoring committee will have to distinguish relative roles of approval for recommended monitoring activities. So far, it had seemed that the Monitoring Group was reporting all that it could, and previous efforts were made in good faith.

Travis noted that the monitoring coordinator should clear up a lot of this. Cara observed that, however, we do need the process. She didn't want people to think there is distrust. Keith noted that he thought there was just frustration, and Amber added that she thinks it's growing pains. Jim noted that there are a lot of details that are not figured out yet – especially how to deal with specific projects. He asked if it was feasible to develop a separate monitoring plan for each project.

Anne C. offered that a solution to the multiplicity of monitoring demands, reporting, and allocation of responsibilities could be some sort of schematic. We need to identify the different groups, and then try to identify the proper order of recommendations, monitoring activities, and reporting. For example, one needs to know where all the weed treatments are going to be. Then we need to figure out how that lines up with monitoring. Cara agreed that a schematic for recommendations and approvals of specific monitoring actions would be good. Anne said that she would work on this. Amber, Megan, and Keith will also be involved. Cara would need to again identify in a format more identifiable as a monitoring plan, based on a template emerging from the “schematic group,” the who, what, when, where, of the upcoming weeds treatments.

ACTION ITEM: Anne, Amber, Megan, and Keith will develop a schematic illustrating the communication needs and appropriate routes for the Monitoring Committee.

Andrew commented that he saw a red flag in that all data that comes in needs to be compatible with corporate databases. For example, in a prior meeting, Andy had identified that for weeds there is no current mechanism to handle this data. This presents a big issue. Andy mentioned that this could be addressed, and Amber clarified that collected information might not fit exactly in current models, but must be useful over the long term. The Monitoring Coordinator, as well as others, will need to figure this dimension out.

Keith wondered what the responsibilities of the Monitoring Committee would be regarding stated monitoring expectations that might emerge in NEPA documentation. Key questions include:

- Is the Monitoring in the CFLRP only an extra increment of monitoring for the landscape level, or is there another purpose?
- Do we need to specify exactly the reach of utility of the CFLRP data?
- Is it the responsibility of the monitoring committee to justify the present and future NEPA decisions?

In his view, the idea that we're going to write a monitoring plan for every project is a huge misconception. It should be enough to say, these are the fundamental questions being asked at the landscape level and this project will be part of this. We don't know how much NEPA specificity we need. Amber noted that the idea that all projects will have a monitoring plan has not been well-communicated and remains unclear to FS staff. Yes, there are some projects that aren't going to have a plan, but we will be talking about how it fits into the SW Crown. We need to be careful to not oversell the monitoring piece.

Jim made sure that the group had endorsed the schematic idea and suggested it should deal at least with four questions:

- 1) The extra increment of original monitoring at the landscape level. The group had agreed earlier that this was important and would be vital to later prioritization exercises.
- 2) A recommendation on what type of monitoring plan would be developed for approved projects on National Forests within the SW Crown. Is there a type of project or a scale of a project requiring an independent monitoring plan? Will a uniform monitoring plan for each project reduce duplication of effort on other Forest Service projects?
- 3) A recommendation on whether the Monitoring Committee conducts specific measurements, for example, fuels, as a special increment on all projects. Would each treatment always have a specific, CFLRP-sponsored set of measurements?
- 4) The level of activity or requirements of the Monitoring Committee based on NEPA demands. What specificity do we need to be able to support NEPA monitoring requirements?

Colt Summit

After a break, Jim suggested that it would be helpful to look at an actual upcoming project to inform how monitoring would need to fit in to advance Forest Service needs. How we operate on our early activities might well cast the die for how we look at other projects.

Chris Partyka gave a Powerpoint presentation on the Colt Summit restoration and fuels reduction project on the Seeley Lake Ranger District. A decision notice for this project was signed on March 25th, and the appeal period closes on May 16th.

Chris saw a sense of urgency for the committee to connect with his staff. Most of his staff are unfamiliar with what's going on at the CFLRP level. After the presentation, Travis asked about the data that had been collected during project development that had changed some of the designs and prescriptions. Chris noted that quick field plots for basal area ended up determining that certain stands already met the outlined desired conditions.

Joe Kerkvliet noted that a big component in the project is the road decommissioning and relocation of a road on the hillside above the creek. He said that he thought this would be a good opportunity to monitor what happens before and after road decommissioning. Dick agreed. Cara noted that, in terms of the experimental framework, she wanted to make sure any measurements on Colt Summit fit into the general framework. On the other side of things, here in the first year we have a special opportunity with road decommissioning that perhaps should not be missed. Jon wondered if the project was addressing a fuel management objective or doing general restoration work. If we put plots in, we need to decide what we want to replicate. Does it fall into a potentially important restoration area or not? Hutto noted the quick answer to the question: what do we want to monitor? He is likely to vote on whatever will have the biggest impact, whatever will happen many times in the future. Anne noted that we need to determine what conditions are now; it does seem like there is a need for baseline monitoring at Colt Summit.

Jim offered a spontaneous proposal. We're already agreed, he observed, that we should be doing an extra increment of monitoring to look at change at the landscape level, the first of the four questions to be addressed by the schematic group. Perhaps this involves road decommissioning, so each road that is taken out may have an impact on the larger landscape. In terms of the other question regarding

whether we should monitor a special component of each project, he thought the answer to this was “yes.” We should do extra fuel monitoring on every project to ensure that the fire models can run effectively and offer some probabilities on any reduced fire risk. By adding a few things, we can make sure crews always collect the necessary data to make sure they have the information to make fire spread models work – a vegetation/fuels “plus” protocol for plots. He suggested adding a fuels aspect on Colt Summit as a contribution of the Monitoring Committee to their already required measurements. Jon said that he would take that suggestion, but wanted look at locations and put out plots that wouldn’t *just* be fuels, to make sure we stratify them out to something that would fit into a bigger framework. Cara, Travis, and Megan all stated that they thought we had just decided not to create a monitoring plan for every project. Hutto noted that it is important to say we will at least consider crafting a monitoring proposal for Colt Summit.

Megan asked for a timeline from Chris to collect additional data on Colt Summit. Partyka replied that they would be looking at selling this project soon; the sale has to be awarded by September 31st. They will be advertising sometime in August. Contract information will be put together in June or July. Things could even start on the ground prior to snowfall. Megan asked when would it be helpful to know what we’re going to contribute? Chris replied as soon as possible. Travis said that he wanted make sure we didn’t confuse short term vs. long term responsibilities. What we’re faced with in the next year or two will be different from what we’ll do with the next 15 years. The other point he made was that having Chris here was great. Seeing early projects might be something we want to have from all the districts. Amber noted that she and her colleagues have projects as well. Each Ranger would love to have additional input on monitoring. She believed a consistent theme across projects is fuels. Gary Burnett noted that there are many reasons to work on fuels, and he agreed with Jim that this is something we could do on each project. Cara noted that one of the updates she had hoped to get to in the current meeting, but would need to delay because of time constraints, was the potential for the use of citizen science monitoring on fuels.

Megan asked if the group wanted to try to get a presentation from Swan and Lincoln at the next meeting. Amber didn’t think the group would have time, and suggested that as a first step, the Monitoring Group focus on Colt Summit. Jim asked the group if there was consensus on ensuring additional fuels measurements at Colt Summit. The group answered yes. Jim also noted that seeing Swan and Lincoln would be good; while it may be late, he said, it’s never too late. It will be good to have a better idea of the intent and anticipated activities on each of the upcoming projects of the next two years.

Andrew noted that we’ve learned an important lesson that the assembly of committees is only going to work if we integrate with everyone. We need to become very assertive with our interactions with the Forest Service and other organizations. We don’t want this to happen again. Keith noted that there are three other projects on Lolo, and the Committee should make sure it hears about those as well.

The next meeting was scheduled for Thursday, the 19th of May.