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**PREMISE:** This document is a composite library of case studies of stewardship contracts and agreements from across the National Forest System. All projects were active at points from 2012 to 2017. Information contained herein was gathered by the Pinchot Institute for Conservation through structured stakeholder interviews.

## PACIFIC COAST REGION

### **Gifford Pinchot Project I. Washington State.**

#### ***PROJECT OVERVIEW***

The project timeline is about five years from initial conceptualization to implementation as one of many projects resulting from a single NEPA decision. This Integrated Resource Timber Contract (IRTC) is considered large (> 1,000 acres) comprised of various silvicultural treatments across approximately 2,000 acres of plantations and one naturally regenerated area. The project is also completing over \$1 million worth of service work including: meadow restoration, snag and large down woody debris creation, treatment of invasive plants, stream restoration, culvert replacement, road decommissioning, road stabilization, reforestation following a fire, and rehabilitation of recreation sites.

#### ***INVOLVEMENT OF NON-AGENCY STAKEHOLDERS***

Due to the value of the timber being harvested there are significant receipts that were generated and put back into the various service activities. The work of a diverse collaborative group in the early stages of formation consisted of reviewing and suggesting various activities for which these funds could be expended. This group also provided outside technical capacity and funding to complete some NEPA related activities, such as stand exams.

Most non-agency participants involved in this project through a collaborative in the early-stage of development express that planning and scoping are the most important ways for them to be involved. They participated very little in the design of treatments, in part because they acknowledge their trust in the agency silviculturalist but also because of the non-controversial nature of treatments. Instead they focused on the service side of the project. Still, some wish they had been able to engage earlier in the planning process to help define the timber side of the IRTC. A local community-based organization secured Resource Advisory Committee funding to complete stand exams for the thinnings in an attempt to accelerate the timeline. This had limited success due to agency delay. This local group expressed losing some confidence in such projects because of this.

#### ***RELATIONSHIPS OF AGENCY AND NON-AGENCY STAKEHOLDERS***

Non-agency respondents felt that their relationships with the Forest Service changed over the course of the project. The number one reason being a change in leadership at the line-officer level which improved relationships. Some agency and non-agency respondents suggested that the creation of the collaborative group itself is an indicator of project success. Still, most involved described relations between the diversity of non-agency participants as tenuous with several divergent views and contested values which hardly softened as a result of collaborative work. On some level, this may be at least partially attributable to the fact that these interests, which had been at war for years largely over timber harvesting, came together not to define what type of timber extraction is broadly accepted but rather to define other activities. The most contentious of which was road obliteration.

In this project there is stark contrast between how some in the agency view the collaborative and how the collaborative members view their group. One Forest Service respondent disconnected from the project said of the group, “*they are congealed into a collaborative that is speaking as one voice...the USFS has put more energy into that collaborative group and maintaining that communication line.*” Non-agency participants did not see it this way. A leader among non-agency participants said, “*We struggled with that [the work they undertook] as a collaborative, there has been a lot of posturing over the years.*”

Non-agency respondents expressed that they were somewhat satisfied with their level of involvement in the project and that they would have liked to have been involved earlier. They said that their field tours are the most useful thing they did together. They also suggest that the most important thing is to get involved early on. While that did not happen in this project, some respondents explained that some of them have gotten involved at earlier stages in other projects since this one.

#### ***EFFECTS OF RELATIONSHIPS ON THE SCOPE AND SCALE OF THE PROJECT***

Every respondent suggests that the involvement of non-agency stakeholders results in project implementation. Respondents do not think that the involvement of non-agency stakeholders affected the scale and only moderately affected the scope by adding service activities which themselves were debated intensely by the group. Members of this early-stage collaborative came together to affect the scope, scale, and the pace of the project, but feel they did not have a significant impact, that the project was the “*low hanging fruit*” as being non-controversial pre-commercial thinning of Douglas fir plantations.

## **Gifford Pinchot Project II. Washington State.**

### **PROJECT OVERVIEW**

This is a large (about 1,500 acre) IRTC project focused on thinning plantations to increase structural diversity and accelerate the development of old growth characteristics. The service items in the project include road closures and decommissioning, snag and down wood creation, road maintenance and removal, stream restoration, and invasive weed treatments. Interviews revealed diverse views on what the project objectives are, including:

*“Accelerate spotted owl habitat formation. Road closures and decommissioning.”*

– Forest Service respondent

*“Restore habitat. Remove roads that were causing aquatic problems or connectivity problems.”*

– non-agency respondent

*“Help create jobs and enhance and protect the National Forest.”*

– non-agency respondent

*“Build relationships in the community. Build trust. Find common ground. Variable density thinning and plant trees.”*

– non-agency respondent

### **INVOLVEMENT OF NON-AGENCY STAKEHOLDERS**

The local collaborative group had significant involvement in all phases of the project except for implementation which was handled by contractors operating outside of the group. The collaborative includes representatives from the local community, forest industry, environmental groups, and a tribal nation. In this project, non-agency participants played a unique role by completing the Environmental Assessment under NEPA which is normally a Forest Service responsibility. The collaborative was vocal in saying that they could do a better job and speed up the process. In response the Forest Supervisor decided to test their hypothesis and let them carry out the NEPA process. While the work was completed by the collaborative and a technical subcontractor, separate members of the group ended up commenting through NEPA as their own independent organizations. This strained relationships within the group. Another strain came as a result of the agency being too hands off, which agency respondents readily acknowledge in retrospect, may not have been constructive.

### **RELATIONSHIPS OF AGENCY AND NON-AGENCY STAKEHOLDERS**

In completing the NEPA work the collaborative determined they actually could not deliver high-quality NEPA review faster than the Forest Service, and that it might have been easier for them if the agency had provided some base level of support. Some felt that perhaps there is a happy medium. Non-agency respondents report having a much better sense of what the agency has to do. Forest Service respondents suggest that due to their working relationships built during this project overall communication have improved and relationships are less contentious. Collaborative members report

satisfaction with seeing a project come to fruition for which they had worked on in multiple phases. Yet some members wish it had been more impactful at a larger scale.

Aspects contributing to the quality of relationships in this project include—early stage communications that are open and inclusive, as well as a commitment to field tours and working through controversial items, and a commitment on the part of agency staff to see projects through. The process of working together toward a success has built trust and constructive relationships between the Forest and the collaborative. A member of the group that is employed by a regional environmental organization described their evolving relationships, saying there are, *“definitely different kinds of conversations with the district ranger and the Forest Supervisor over the course of the project that we would never have had otherwise, which I think, at least for us on our side, it had to weigh more. It just kind of increased my trust in the agency.”*

For the agency, their staff report taking the collaborative and communications with this group more seriously as a result of the positive effects of this project. Going forward, both sides of this relationship report being more focused on getting involved earlier and building consensus earlier. In part because the diversity of interests acknowledge that collaborative discussions can yield creative solutions even when not everyone in the group agrees. People are talking rather than litigating.

#### ***EFFECTS OF RELATIONSHIPS ON THE SCOPE AND SCALE OF THE PROJECT***

The involvement of non-agency participants through the collaborative process is believed to have improved decision making and helped develop and implement diverse objectives. Collaborative members felt that their involvement made the project more complex and larger. One non-agency respondent felt that the collaborative process did not lead to the scale or scope of implementation that they themselves wanted to see occur.

## **Okanogan-Wenatchee Project. Washington State.**

### **PROJECT OVERVIEW**

This is a large integrated resource timber contract (IRTC) seeking landscape-scale outcomes tied to a CFLR project. Project objectives as identified by respondents include: increasing forest resilience in a multi-ownership landscape, reducing hazardous fuels, promoting the development of late-successional forest habitats, putting up “a timber sale or stewardship contract by working with the collaborative,” and improving local economies and job opportunities. Overall, the project is largely viewed as a success by agency and non-agency respondents.

### **INVOLVEMENT OF NON-AGENCY STAKEHOLDERS**

Stakeholders outside of the Forest Service include a tribal nation, two state agencies, two non-profits, two federal agencies who were consulted during NEPA for ESA issues, and two companies from forest industry. Most non-agency stakeholders were involved in NEPA scoping and reviewing the proposed alternatives, in post-NEPA project planning, and monitoring. A few non-agency stakeholders participated earlier to help develop the broad purpose and need for the project at the landscape level. Some expressed frustration with how broad the objectives were early on and with being brought in at a later stage.

Even though this is part of a CFLR project which by definition is supposed to include collaboration, interviewees suggest that there was not significant involvement of non-agency stakeholders in the design of NEPA alternatives or even in the tacit identification of a proposed alternative. Rather, the Forest Service designed these and shared them after the fact. Yet, early involvement of external stakeholders in project planning and design is cited by Forest Service project participants as being critical to project success and improving the efficiency of the NEPA process.

Despite this acknowledgement, non-agency participants expressed that the greatest challenge in the project, besides agency personnel turnover, was, “*not being engaged early enough to have a good feel for the direction the Forest Service is headed....and not being able to provide meaningful comments to influence the project....part of the problem is the lateness that the Forest Service decides to involve people and just the seemingly lack of interest of the Forest Service wanting to change any of the projects.*”

In this project, late non-agency involvement also impacted the rate of success. The Forest Service had a hard time initially attracting bidders for part of the project area. Interviewees express that this may be due to how it was packaged and requirements for helicopter logging.

A state agency forester working on state land nearby suggested that he positively contributed to reshaping the scope of the project with recommendations to unit layout and packaging of implementation activities in a manner that facilitated the contract.

### **RELATIONSHIPS OF AGENCY AND NON-AGENCY STAKEHOLDERS**

Almost all participants expressed that relationships changed mostly for the better as a result of their participation in this project. On the negative side, agency turnover affected agency-to-non-agency relationships and project progress. When leadership left, all those communications and trust that had been established suffered.

“It's just there's a lot of turnover in the Forest Service and sometimes, the folks that start the collaboratives on these projects are not necessarily the folks that end up with it. There needs to be a real conscious commitment to continue those relationships and that there is a good pass off when players from the Forest Service change.” Okanogan-Wenatchee National Forest, non-agency participant

#### **EFFECTS OF RELATIONSHIPS ON THE SCOPE AND SCALE OF THE PROJECT**

There was disagreement over whether the project grew or shrank in size. A non-agency stakeholder said, *“I think they started out rather big and the thing shrank down...at least 30%, if not more.”* An agency respondent felt that the project did not increase in scale due to it being constrained by environmental factors (e.g. ESA considerations) whereas, two non-agency respondents suggest that it increased in size due to implementation activities across boundaries. This speaks to the variance that exists in terms of how different people view what constitutes “the project.” For some it is a landscape level effort, such as a CFLR project, for others it is something smaller, such as a single contract. A representative from a state agency stated, *“Some of our lands are adjacent to Forest Service lands. There is a certain amount of osmosis between what we're doing on our lands and what they do and vice versa.”*

As for changes in scope or in the project's complexity, two non-agency participants believed that it grew more complex due to all the additional communication that needed to occur during project design—because of multiple organizations engaged and due to staffing transitions, but two also expressed that the scope did not change. Another respondent claimed that the harvesting systems grew less complex, which they viewed as being for the better, with some of the more expensive approaches, cable systems, and helicopter yarding, being removed.



## **Colville Project. Washington State.**

### ***PROJECT OVERVIEW***

This large 10-year contract aims to complete restoration work on approximately 54,000 acres utilizing an innovative approach integrating environmental analysis through NEPA and project implementation into a single stewardship contract. The project was birthed out of the work of a local collaborative group—the Northeast Washington Forest Coalition—which has worked on more than 30 stewardship contracting projects across 150,000 acres prior to this project. This group received a Collaborative Forest Landscape Restoration Program (CFLR) grant in 2012 and has leveraged that momentum into the project.

The contract was awarded to a local forest products company, which is subcontracting the NEPA analysis to environmental consultancy as the first task order beginning in 2015. The concept is to build local capacity and not involve the local Forest Service specialists, or involve them minimally, because they have limited staff and they already have their hands full with existing projects.

The company is taking a big risk on the project by investing in the NEPA analysis knowing full well that the project could be delayed or canceled for any number of reasons. However, they trust that the efforts of the collaborative group will work and that they will be able to recoup their investment in the project through increased logging activity on the Colville National Forest.

### ***INVOLVEMENT OF NON-AGENCY STAKEHOLDERS***

The Colville National Forest has implemented a number of stewardship contracting projects; individuals in the project possessed a mix of experience regarding stewardship contracting projects. For some, this was their first project whereas other participants have been a part of as many as 20 stewardship contracting projects. Likewise, interviewees varied to the extent that they considered themselves to be local stakeholders.

The collaborative group formed in 2001 as a loosely connected group of environmental and timber interests that came together to initially address only hazardous fuels reductions in the wildland urban interface. The collaborative is involved in project planning and the NEPA process and involves at least 9 separate entities. Because this project has a unique structure with NEPA analysis being essentially contracted out twice (first by the agency and then by the contractor) the project has rigid roles for, and legal separation between, the contractors and their subcontractor completing the NEPA analysis.

### ***RELATIONSHIPS OF AGENCY AND NON-AGENCY STAKEHOLDERS***

The company entered into an MOU with the Colville National Forest about 10 years ago to focus on a collaborative approach to identifying hazardous fuel reduction and forest restoration projects in second growth roaded forests. This coincided with the development of the collaborative group chaired by an individual from the company.

When asked whether the involvement of non-agency stakeholders in this project had changed relationships that these stakeholders had with the Forest Service, agency interviewees replied that they did not think relationships had changed as a result of this project but rather that there had been an

evolution of relationships over a longer timeframe. According to project participants environmental groups have gone from an adversarial position to a cooperative one, as a result of strong collaboration on developing several stewardship contracting projects.

***EFFECTS OF RELATIONSHIPS ON THE SCOPE AND SCALE OF THE PROJECT***

A representative of the Forest Service suggested that the forest products company being a major force in the collaborative, had influenced the scale of projects through their work with the group. This same respondent suggested that environmental groups also affect the scale of projects by pushing for tighter sideboards as projects get more complex. This person described the interaction of the timber industry and environmentalists as “*opposite poles*” that balance each other. Other respondents expressed that they did not feel there was much influence on the scope and scale of projects due to the actions of non-agency stakeholders engaged in the project.

## **Mt. Hood Project. Oregon.**

### **PROJECT OVERVIEW**

This project focuses on variable density thinning of 30 – 60 year old Douglas-fir plantations across 2,000 acres of the Mt. Hood National Forest. Nearly four years in development through the local collaborative group, the goals for the project were to create a more diverse mix of habitat features across the landscape and to restore watershed conditions. The project is a product of a collaborative group—the Clackamas Stewardship Partners—working for several years on restoration-oriented projects including several stewardship contracting projects.

### **INVOLVEMENT OF NON-AGENCY STAKEHOLDERS**

Project participants identified 13 non-federal stakeholders participating in the collaborative group in NEPA scoping and project planning. The collaborative group meets regularly and had advanced relatively non-controversial projects until this one. The group includes several environmental groups as well as timber industry organizations with several other conservation organizations and government agencies comprising the balance. One environmental group left the collaborative because they filed a lawsuit against the Forest Service over this project, but has since rejoined.

### **RELATIONSHIPS OF AGENCY AND NON-AGENCY STAKEHOLDERS**

Many of the non-agency stakeholders interviewed have been involved with a number of (8 – 10) stewardship contracting projects. When asked if the relationships of agency and non-agency stakeholders had changed as a result of the project respondents gave different answers. A Forest Service representative involved in the project said no, nothing had changed except for relationships with the environmental group that had pulled out of the collaborative group to appeal and litigate the project, which according to agency representatives, “*caused enormous tension and relationships that were once positive, or at least cordial, have gotten really crunchy.*” The environmental group felt that the project had been planned and actions decided by the Forest Service before it reached the collaborative group and that their participation in the group was a “*rubber stamping*” of a project they did not agree with.

The Forest Service suggested that relationships with the other environmental groups engaged in the project had not changed as a result of the project or other projects they had worked on together, with the exception of this environmental group. Still, a representative from another local NGO suggested that working together had shifted their organization’s relationship with the Forest Service from poor to moderate. This individual also recognized the relationship between the Forest Service and timber interests as “*up and down*” with the fluctuations in the timber market.

### **EFFECTS OF RELATIONSHIPS ON THE SCOPE AND SCALE OF THE PROJECT**

When asked about whether non-agency stakeholders shaped the scope and scale of projects, responses were mixed. The Forest Service respondent did not feel that this was the case, while a representative from a local NGO suggested that all interests—timber companies, conservation groups, hunting groups, did in fact shape the scope and scale of projects.

## Tongass Project. Alaska.

### **PROJECT OVERVIEW**

This is a large IRTC project focused on harvesting of low-elevation old growth temperate rainforest. An agency representative defined the project objective as “to manage some of the timberland on the Tongass to meet our management plan, our Tongass Land Management Plan,” with a secondary objective being to provide funding via retained receipts for “restoration type projects.” Local environmentalists opposing the project say the objectives are, “to further the timber industry” and that “the objective really is to, for the Forest Service to fulfill its mandate of timber harvest.” A Forest Service respondent said “this was a NEPA timber project in the beginning, and then we turned...and then it evolved into a stewardship contract.”

### **INVOLVEMENT OF NON-AGENCY STAKEHOLDERS**

The Forest Service formed a “Stewardship Group” to identify activities that could be paid for by the receipts from the project. In describing the purpose of this group and a specific member’s involvement, an agency representative stated, “the collaboration was more of what kind of restoration projects he felt would help the management of the Forest you know he still, in his mind, didn't like the idea of harvesting timber, in order to do restoration projects.”

When asked if non-agency stakeholders were involved in the early planning of the sale, one community member said, “not at all. No, that’s not the way the timber planning industry works here. The public is not involved in the actual hands on finding and planning the sale.” Of the NEPA process, a representative of an environmental organization commented:

Yeah, we certainly participated in scoping, and made comments in regards to the draft.... So, for a number of reasons, we chose not to litigate, but did feel that it was very important for us to be a part of the stewardship process in terms of entering our input. In terms of monitoring, of course, there was talk about monitoring, but we have yet to see that, and we spent a fair amount of time asking that the issues related to the targeting of high volume old growth habitat would...We basically asked for no more cutting of high volume old growth habitat, but that was not honored because it had to do with the economics of the timber sale.

Another non-agency stakeholder said of their involvement through NEPA, “Well, nothing changed. The sale went forward to the letter as the Forest Service wanted without any concessions to the public at all. So, it was just as if there was no scoping process and no stewardship process.” When asked if project planning is the most important thing for non-agency stakeholders to be involved in, one non-agency respondent said, “I think that’s what we are still removed from.”

Non-agency respondents who were opposed to the project based on it being about harvesting old growth referred to the service items which they were brought in to “collaborate” on as being “pre-ordained,” and expressed feeling they had no influence. A Forest Service representative said, “we were gonna do the project anyway but we wanted his input on how the project was gonna be implemented. We were going to go and do this project.”

Representatives from a local environmental organization explained that they believe while the agency was convening stakeholder meetings about the expenditure of receipts, the agency was simultaneously “*behind closed doors*” planning how to spend the money and that the receipts expenditure ultimately went to items not even discussed at the meetings. A retired logger from the local community disagreed saying, “*I think the line officer listened to all the recommendations or the input during collaboration and we implemented some of that.*” Still, this participant also said that the process “*was just a failure,*” further explaining:

I thought he [District Ranger] did a great job trying to steer us into productive ground...most of it was seriously, hour after hour of just bashing forest management practices, the Forest Service, the logging industry. And most of it, 90% of it, was just completely unproductive time doing that instead of coming up with some productive ideas and solutions and plans to use the money that the funds that were going to become available...And it just got really discouraging.

The Forest Service describes these meetings as being the work of a “collaborative group,” with one agency respondent saying, “*We were gonna implement it with collaboration or without it, but having it is probably a good thing.*” Of these meetings between the Forest Service and non-agency stakeholders, an agency respondent said:

Mostly, you know, I mean originally, we have participation in the NEPA document. You know, that was the original participation. But then in the collaboration, they were there at the meeting and spoke on what their personal and group feelings were on the project, as a whole. So I mean you know they were able to speak at these collaboration meetings about how they felt about the project. You know and it was recorded, and written down.

Conversely, about this same situation a non-agency participant said:

I can't say I collaborated, I attended. The board believes by mere attendance that you've collaborated so I wanna be very clear on that, and the project was not a result of collaboration amongst the group, it was convened by [the District Ranger]....They tried to cast that as a product of the collaborative but it was not, that was an in-house proposal.

Another non-agency response:

The Forest Service spun it as by your mere attendance, you have collaborated. So, I would not say that any individual had any effect on the project. The projects that they decided on, they were gonna do anyway....And that's pretty clear from the records.

Another simply concluded that, “*it's a public relations stunt, is what it is. And that's all it was....we were really misled [the agency lead] basically lied to the public because they were planning all of these projects in-house already.*”

Most of the non-agency participants felt that the meetings were significantly biased by having them facilitated by the District Ranger and having the meetings disproportionately full of Forest Service staff. Participants expressed that they believed that the written record of the meetings did not accurately reflect what happened in the meetings.

## **RELATIONSHIPS OF AGENCY AND NON-AGENCY STAKEHOLDERS**

One of the respondents explained, “*Our relationship with the Forest Service goes back decades, we’ve been commenting on timber sales....Either for timber sale or against and for habitat protection or not for decades. So, we’ve established with this relationship we have with the Forest Service, it’s a long established relationship.*” The same person also expressed frustration that the process of commenting through NEPA did not yield any measurable influence on this project and others.

From the agency perspective, when asked what they thought is the most challenging aspect of non-agency stakeholder participation in stewardship contracting projects, a Forest Service respondent suggested, “*I think the most difficult is constructively listening to people that are adamantly opposed about what we’re doing....we have some pretty outspoken groups and individuals that would rather not see us implement our Forest Plan.*”

There are many challenges to collaborative relationships in a place like this. An economy made up of seasonal employment means people are not often able to attend regularly scheduled meetings. Different participants tend to come to each meeting so the conversation about priorities has difficulty advancing. Also the history of logging old growth in Alaska is a significant flash point that people just cannot get beyond to identify any common ground elsewhere. All of this impacts how the agency relates to non-agency participants. Describing this, a non-agency participant said, “*the most challenging thing is to force the agency to take non-agency stakeholders, and I should say the stakeholders that are not with the timber industry....seriously.*”

In other projects the agency reports that the most challenging things is explaining the mechanics and rationale of stewardship contracting to non-agency participants. In this project, this appears to not be the case. Here locals outside of the agency clearly understand stewardship contracting, they just have a fundamentally different vision about how it should be used. One non-agency participant articulated:

*My understanding of the stewardship and restoration initiatives by the Forest Service is that the funding stream to the agency itself has been highly variable, and the trend of our funding is such that there are uncertainties built into the agency budget, and I see the Stewardship Contracting as a means to achieve conservation objectives using receipts from timber sales to help to mitigate the consequences of timber sales. And also, of course, to instill a sense of participation from directly impacted individuals, whether they are impacted by the environmental consequences of it, or are impacted by the economic potential that the timber sale extensively represents.*

## **EFFECTS OF RELATIONSHIPS ON THE SCOPE AND SCALE OF THE PROJECT**

Instead of providing their input on the scope of the project, the majority of non-agency participants did not want to work with the Forest Service to plan these activities. The main effect of relationships on the scope of the project was to not expand the project scope, but for non-agency participants to vehemently oppose the project, and for whatever trust existed to be further degraded.

## **Klamath Project. California.**

### **PROJECT OVERVIEW**

This is a large project over 1,800 acres that is focused on treating hazardous fuels in a late successional reserve under the Northwest Forest Plan. As defined by respondents the objectives of the project are to: “create a fire-resilient forest especially near communities;” “forest health, fuels reduction, wildlife enhancement;” “reduction of fuel loading, enhanced fire resistance, forest health improvement;” and “density reduction to minimize wildfire. Promote forest health.” Private industrial timberland is interspersed in a checkerboard pattern with the project area, as is the case across much of Northern California.

### **INVOLVEMENT OF NON-AGENCY STAKEHOLDERS**

There was no collaborative group associated with the project; rather there were two separate groups of non-agency participants. First, the Restoration Area Planning Group, which includes the local Firesafe Councils, the Fire Learning Network, and a regional non-profit. Second, a forest products company and two contractors with whom they work. “Environmentalists” are mentioned but they were not listed by respondents as being directly involved in the project.

Those listed as involved worked with the Forest Service on scoping, project design, and multi-party monitoring field trips. Participants from the forest products sector participated by helping ensure that the Forest Service put together the types of projects that would be economically viable. Concerned environmental groups were taken into the field by the Restoration Area Planning Group to discuss the project. One non-agency respondent explained the local dynamics:

There's several extreme environmental groups who challenge almost everything...so they would request a special field trip to go out with the Forest Service. We would go with them and so, all of a sudden, these groups realized that they weren't dealing with just the Forest Service, they were dealing with the community, stakeholders, land owners, Fire Safe Councils. And so, we would push back professionally why we thought this project is a good project. So we were supportive of the Forest Service and those endeavors....when we would attend meetings or field trips with these groups that were already anti-project. They would come with a very indefinite agenda, not coming to the table willing to listen and maybe adjust and we had to come to the table trying to convince them and that's always a challenge. Because sometimes they came to the table with agendas that were bigger than just this project.

Non-agency stakeholders who were engaged in the project mainly participated in scoping (verbal comments), planning (attending meetings, commenting, and implementation (putting contracts together). An adjacent industrial timberland owner was not involved in any of the planning phase but the project activities did spill over onto their land. In terms of the benefits of involving non-agency participants, the Forest Service tended to emphasize that these groups can help get projects done by providing some cover to the agency around the project need, and also ensuring that the project, as designed, is “economically viable and will lead to the best result in both cases in terms of doing something substantial for the landscape that's actually noticeable versus just putting together small projects that make work that really don't accomplish much.”

Overall the involvement of non-agency participants is believed to have resulted in improved decision making and a project design that could occur in an integrated way across boundaries, which made a difference for the scale of the project. For instance, working with three adjacent landowners helped define the system of fuel breaks across the landscape.

For the most part non-agency participants were satisfied with their level of involvement, but one respondent noted that because loggers are all busy working in the woods they are essentially excluded from collaborative processes, which presents challenges since these are the main implementers with whom which the Forest Service seeks to work and they provide critical on-the-ground knowledge about harvest operations. As a logger put it:

On the other stuff, the planning part and the scoping and that, we do our best to stay involved and engaged but it's pretty difficult for people in our position and for our contractors to really be involved because we've got a lotta other responsibilities that need to be met. We just don't have the time to attend numerous meetings over one small project. And so, I think the participation at the planning level tends to be skewed towards those whose sole focus is to intervene in that planning and scoping aspects....It can result in a project where we're really not getting the full breadth of perspectives....We just can't justify engaging on every millionth foot little timber project. And I would like to see the Forest Service get away from the way they're planning these projects and soliciting input and do that at the front end.

Likewise, another respondent from the forest products sector suggested that the involvement of all non-agency stakeholders early on in scoping is important, saying:

So that we can help them put together a project that is gonna be most effective on the ground and it's gonna be the most economically viable and will lead to the best result in both cases in terms of doing something substantial for the landscape that's actually noticeable versus just putting together small projects that make work that really don't accomplish much.

#### ***RELATIONSHIPS OF AGENCY AND NON-AGENCY STAKEHOLDERS***

In terms of the project's effect on the relationships, the act of planning and implementation led to a firming up of already solid relationships and a conformation of how to work together across ownerships. Both agency and non-agency participants attribute the quality of relationships to open communication and being upfront with each other. Another noted that being able to speak freely to the agency and a willingness of both sides to listen and accept new ideas is critical. A non-agency stakeholder also emphasized the value of stewardship authorities in meeting local needs:

I think the stewardship authority is very beneficial because it provides the vehicle for engaging communities and engaging local workforce, and local economic development versus just like a single contract that's put out that somebody from local or exterior comes in and does it and leaves. It's more of a local based opportunity for both input and actual job creation.



In this project, participants suggest the most difficult thing about involving non-agency stakeholders is finding ways for them to participate and continual maintenance of a non-adversarial atmosphere where people will be willing to work together.

***EFFECTS OF RELATIONSHIPS ON THE SCOPE AND SCALE OF THE PROJECT***

For the most part respondents felt that this project was a positive step forward toward creating a more resilient landscape. Some still feel that it was not a true success because the project did not treat as many acres as they would like, pointing out that an estimated 10% of the Forest burned this past year. The scope and scale changed (expanding across ownerships). One respondent from the forest products sector pointed out a few problems with many projects in this area that begin with a broader scope and get parsed down. This respondent suggested that this was a result of collaboration. Whereas others that are more involved in this project suggested that it was various groups working together that led to this project expanding across ownerships.

## **Shasta-Trinity Project. California.**

### ***PROJECT OVERVIEW***

This project seeks to increase the structural complexity and species diversity of tree plantations established from the 1960s – 1980s, characterized by agency and non-agency participants alike as having been “abandoned” over the last few decades. The purpose of thinning these stands is to improve forest health, productivity, and resilience in densely stocked plantations susceptible to drought, disease, insect infestation, and uncharacteristic wildfire at a landscape scale. Additional goals are to move these stands toward more natural forest conditions and accelerate development of characteristics of older forests. Overall, the project is largely viewed as a success by agency and non-agency respondents because while mid-stream, it has already accomplished more work than has been accomplished on the Forest in quite some time.

In regard to the project design, non-agency participants also pushed for social and economic objectives, specifically, creating a steady supply of small diameter logs and a long-term contract that can entice investment in wood processing to increase the financial viability of restoration projects. After the purpose and need was defined through a collaborative process facilitated by a local non-governmental organization, a programmatic approach to the NEPA analysis was applied to analyze more than 30,000 acres of plantations. This NEPA process lasted nearly five years. The major turning point for the project came in Endangered Species Act consultation with the US Fish and Wildlife Service and NOAA Marine Fisheries Service. These agencies were uncomfortable with the programmatic approach and requested more site-specific analysis. Forest Service personnel worked with these agencies and elected to reduce the size of the analysis to approximately 20% of its original size. Now operational after nearly a decade in development, stewardship contracting was a consideration for this project long before NEPA analysis. Implementation is taking place on fewer than 1,000 acres.

### ***INVOLVEMENT OF NON-AGENCY STAKEHOLDERS***

This Forest has a long history of conflict characterized by consistent appeals and litigation. In some ways this project represents the first attempt at changing this dynamic by using collaboration. Beginning close to a decade ago; industry, environmental groups, conservation organizations, and local advocates of forest restoration began working with the Forest Service to conceptualize a large campaign to improve conditions within the Forest’s plantations. Through this initial collaboration, the programmatic approach gained momentum, NEPA commenced and collaborative work ceased. A non-agency participant involved in the initial collaborative effort that defined the scope, purpose, and need for the landscape-scale effort relayed that:

Once it went into that box, the NEPA box...it really became a Forest Service project....there really wasn’t any more collaborative work with those original collaborators. Then [a new collaborative group] comes on the scene in 2011-2012 and by then the project was reduced in size and further developed in NEPA. The [new collaborative group] never submitted formal comments or participated in scoping.

All non-agency respondents felt their contributions improved decision making but report dissatisfaction with how the Forest Service communicated during the NEPA process. Some non-agency participants expressed that they tried to contribute constructive comments during NEPA public engagement but that

ultimately these suggestions were ignored, which in their opinion was to the detriment of the project. One participant expressed that the Forest Service did not analyze the use of mechanical treatments on a significant portion of the acres analyzed through NEPA, negatively impacting project economics and the ability to use prescribed fire. To one non-agency stakeholder, this equated to functionally taking two years' supply of small-diameter trees off the table and not meeting the purpose and need they originally developed through a collaborative process that included the Forest Service.

#### **RELATIONSHIPS OF AGENCY AND NON-AGENCY STAKEHOLDERS**

For non-agency stakeholders involved in the original collaborative effort that envisioned a much larger project, social and economic goals were a priority. One participant interviewed suggested, *"the original goal was really to put enough NEPA shelf stock out there in small wood thinning to then be able to create a 10-year stewardship contract that could help put new infrastructure in...that really didn't come to pass, when the NEPA got scaled back and the timelines really lagged...the opportunity basically evaporated."* Agency participants recognize that scaling down the project disappointed their non-agency counterparts, suggesting, *"I know that by going forward with a smaller project than what had been originally envisioned, people were disappointed. But it was the best could do at the time."* Factors that led to this outcome include the length of time from the original idea to NEPA decision and the lack of transparency about decision making along the way.

The project as originally conceived would have been significantly larger than the Shasta Trinity National Forest had been able to implement in quite some time, and even at a dramatically reduced scale it is still bigger than usual. However, for some stakeholders who had successfully secured grant funds to implement the project, the scale of the NEPA and the structure of the implementation actions did not meet their own objectives. Nor did they feel that they could influence the agency at key decision points in the project, specifically NEPA and post-NEPA project design, or even that their contributions were valued.

Lack of clear communications hurt relationships of early collaborators but non-agency collaborators more recently engaged expressed optimism that the Forest Service would eventually grow a culture of collaboration on this Forest as the swell of public involvement grows. Some non-agency participants offered suggestions for things the agency can do to improve collaborative relationships: involving people prior to scoping and maintaining clear and consistent communications throughout the project, especially during extensive NEPA analysis.

#### **EFFECTS OF RELATIONSHIPS ON THE SCOPE AND SCALE OF THE PROJECT**

All of the individuals interviewed for this project expressed that the non-agency stakeholder involvement did not influence the size or scale of the project. Non-agency stakeholders perceive that the Forest Service decision to reduce the size of the project hinged on wanting to avoid *"dealing with cumulative impacts so that they wouldn't cross any thresholds of concern, so that it would be easier to get through [Endangered Species Act] consultation."* At the time, this was never clearly communicated to those non-agency stakeholders who were involved early to envision a larger project and they were left feeling that the project was not a success because it *"held so much promise and was squandered so miserably."*

## **Lassen Project. California.**

### **PROJECT OVERVIEW**

This project is a fire salvage harvest under 1,000 acres along 20 miles of road in an area popular with the public. The Forest Service had offered it as a timber sale but the project went no bid “two or three times” so it was repackaged as an integrated resource service contract (IRSC). Overall, this stewardship contract is viewed as a success by agency and non-agency respondents.

### **INVOLVEMENT OF NON-AGENCY STAKEHOLDERS**

Non-agency participants included several forest product companies, nearby private landowners, and the contractor. According to the Forest Service, forest industry helped them design the project post-NEPA by providing technical advice and feedback to Forest Service personnel attempting to package a program of work that would encourage bids. As explained by an agency representative, this consisted of “*getting input on how we can make the project work, and then getting their input on operations and how to better package the project.*” This was done in bid workshops and field tours within the project area.

Agency representatives admit that the involvement of non-agency persons was very limited, as the NEPA analysis was already complete and because, “*it was pretty straightforward in what we wanted to accomplish....so involvement I don't think was as needed,*” said the agency representative interviewed. This can be contrasted with what a non-agency stakeholder said, “*I don't think that even when you write the letter and give the information....I think that's a technicality of the NEPA. I don't think they pay a whole lot attention to what people say. They have an idea of what they want.*”

### **RELATIONSHIPS OF AGENCY AND NON-AGENCY STAKEHOLDERS**

The agency reports that the involvement of the industry in post-NEPA project planning resulted in an improved package of work. The contractors also suggest that they helped the Forest Service save significant resources because they accomplished the work for less than what was initially expected.

When asked about the most challenging aspects of engaging non-agency stakeholders, the agency representative said, “*once we got started on the project....that was when more of the issues arrived, the way we packaged it. And I guess that if we were to do it again, which I hope we never do, but if we had to do this project again, some of the trials and tribulations that we ran across during that project implementation, I would definitely bring those upfront when we took the folks on the ground on the field trip, explain things a little more clearly.*”

### **EFFECTS OF RELATIONSHIPS ON THE SCOPE AND SCALE OF THE PROJECT**

Non-agency participants in this project did not change the scope or scale, but did affect how the activities were packaged.

## **Plumas Project. California.**

### ***PROJECT OVERVIEW***

Since 2008, this project in the Sierra Nevada Mountains has been modified several times before it was eventually sold as a stewardship contract. The project was appealed by Sierra Forest Legacy, an active environmental group in the region. Despite having a longstanding collaborative group in the region—the Quincy Library Group, this stewardship contract is identified as having few cooperators engaged, although respondents stated that they did have prior experience with a number of stewardship contracting projects.

### ***INVOLVEMENT OF NON-AGENCY STAKEHOLDERS***

Non-agency stakeholders (and corresponding roles) involved in the project include the county Fire Safe Council who was involved in planning and monitoring; the Quincy Library Group which engaged during the planning process; a regional conservation organization which engaged in planning; and a contractor engaged in implementation of the project.

### ***RELATIONSHIPS OF AGENCY AND NON-AGENCY STAKEHOLDERS***

Responses were mixed when interviewees were asked about the historical and current relationships between the Forest Service and the non-agency stakeholders engaged in the project. A Forest Service interviewee suggested that these relationships are generally good relationships and that the project had not affected these relationships. The local Fire Safe Council also stated that relationships had not changed but that they were trying to grow relationships to get more involvement upfront to help encourage other non-agency stakeholders to generate and advance projects rather than be reactionary.

Another non-agency stakeholder stated that relationships between the Forest Service and non-agency stakeholders had not changed as a result of the project with the exception of the Quincy Library Group. The interviewee believes the Group has continued to erode its relationship with the Forest Service, saying:

Oh, it's never been real positive and it's always a struggle. You know everyone is trying to increase pace and scale [of restoration] and we all know it isn't happening, you know it's frustrating when you see what happens every year we see more and more ground burn up and have larger impacts on habitat than logging would ever have. I know QLG has been trying to push this forward and it just goes nowhere...

This same interviewee alleged that the Forest Service gives favored treatment (private tours) to environmental organizations which this stakeholder believes is a problem because he feels it gives a single interested stakeholder undue influence on agency decisions.

### ***EFFECTS OF RELATIONSHIPS ON THE SCOPE AND SCALE OF THE PROJECT***

Interviewees disagreed as to whether the agencies' relationships with non-agency stakeholders had an impact on the scope and scale of project. An agency representative said that these relationships did not have an effect on the scope and scale of the project, while one non-agency interviewee felt that the Quincy Library Group had an effect by pushing to increase the scale of projects. Another non-agency

respondent felt that a local environmental group depressed the scale and the scope (residual basal area) of projects. The Fire Safe Council was identified as not influencing the scale of the project, but it was suggested that it has influenced the scale of other projects.

## NORTHERN ROCKIES REGION

### **Lolo Project I. Montana.**

#### **PROJECT OVERVIEW**

This project includes harvesting of commercial sawtimber and pre-commercial thinning on approximately 675 acres, road maintenance and decommissioning, recreational trailhead improvements, and stream habitat restoration. Project objectives include: improving forest health, reducing hazardous fuels near rural homes, improving fish and wildlife connectivity, maintaining water quality, and improving recreation access. This was the first Integrated Resource Service Contract (IRSC) the Lolo National Forest had undertaken. It took more than a year (2007/2008 – Fall 2009) to get the contract in place, and the first part of the contract was not implemented until another year had passed. Respondents expressed frustration with the pace.

#### **INVOLVEMENT OF NON-AGENCY STAKEHOLDERS**

A local collaborative group, the Lolo Restoration Committee, is the main non-agency stakeholder involved in the project. The Forest Service brought the project idea to the collaborative group and after some discussion the group agreed that it was a good idea to get involved in the project. Additionally, local homeowners were engaged as part of the collaborative group during scoping, planning, and implementation, with at least four or five homeowners engaged during the early design and formulation phase of the project. The homeowners were identified by respondents as mainly being concerned with the mitigation of fire risks.

The collaborative group engaged the Forest Service during project planning, NEPA scoping, implementation, and monitoring. Collaborative group members report monitoring project implementation closely, while agency respondents report that this level of close monitoring was inconsistent throughout the term of the project. In large part, monitoring was described as keeping an eye on contractors and the agency rather than monitoring to determine ecological outcomes.

#### **RELATIONSHIPS OF AGENCY AND NON-AGENCY STAKEHOLDERS**

Collaboration ebbed and flowed over the project duration coinciding in some ways with membership changes in the collaborative group and progression of the project phases. Agency personnel identified that as many as 20 individuals participated in the collaborative group early in the project and that as few as 10 individuals participated later-on. One non-agency participant described this as “*just normal attrition somewhat due to the slow pace of these collaborative projects.*” This same interviewee suggested that this was the first project the collaborative group had worked on together and that early on there was “*a really good cross-section...from the community*” and that expectations were high for the collaborative process to deliver. An agency employee stated that relationships changed due to the role of specialists on committees in the collaborative who did not like how some of the activities were completed during implementation, whereas non-agency respondents expressed a feeling that the agreements arrived at during collaborative work on the planning phase were not honored during implementation.

The length of the planning process left all interviewees with frustrations. Agency personnel involved with the project stated that relationships changed due to: collaborative fatigue, the role of specialists on committees in the collaborative, extensive environmental analysis because of a fear of litigation, and a lack of follow-through on verbal agreements made during the collaborative process from field tours on through to the NEPA analysis and ultimately to the contract.

One non-agency stakeholder stated that there was some lack of communication between the pre-planning collaborative work and implementation. Specifically the layout of the landing and the intensity of logging near a trailhead are issues on which collaborators disagreed and where some felt that agreements made during planning were not honored. Still, a non-agency stakeholder suggested that relationships changed for the better as people involved in the collaborative group were able to work through issues of trust resulting from a disconnect between pre-NEPA planning and logging of this particular unit.

Turnover in the leadership of non-agency stakeholders in the collaborative occurred as well. One non-agency stakeholder an environmentalist, suggested this may have contributed to “*some hard feelings over a particular unit,*” which “*was an example where they did not follow our recommendations, and so there was some heartache over how the unit was logged, they also modified the contract to expand the unit, but the big issue was they ended up taking all of the lodge pole out of the unit [regardless of] whether it was alive.*”

#### ***EFFECTS OF RELATIONSHIPS ON THE SCOPE AND SCALE OF THE PROJECT***

The two agency representatives interviewed about this project felt that in general the scale of projects they have been involved with or observed are reduced from the time they are first proposed to the time they are implemented. One agency employee interviewed about the project stated that he did not feel that the scale of the project was influenced by non-agency stakeholders but that “*in general people want to make projects smaller.*” The other agency interviewee cited that the scale was influenced by non-agency stakeholders, stating that the agency started out trying to implement a larger project because the agency considered it necessary to achieve economic and ecological objectives, but that this project and others he had been involved with “*got pared way down*” because of social and economic constraints. This agency employee suggested that projects are made smaller to appease potential litigants.

An environmentalist engaged in the collaborative group felt that the project has been a good learning exercise on how to work together. Stating that he felt non-agency stakeholders were able to bring forth criticisms through “*constructive channels*” to the agency about activities they did not want undertaken in the contract which they admittedly recognized would be difficult for the agency to hear.



## **Lolo Project II. Montana.**

### **PROJECT OVERVIEW**

This Integrated Resource Service Contract (IRSC) is just less than 1,000 acres. The project area is a second growth forest originally logged in the 1960s. The project objectives were to improve forest health and reduce wildfire risk across the project area and adjacent Tribal lands. Activities included thinning and controlled burns to reduce tree density, road maintenance, road construction, and road decommissioning.

### **INVOLVEMENT OF NON-AGENCY STAKEHOLDERS**

The project was “*off the shelf*” as it had been developed and had gone through NEPA. This project originated with the Forest Service and the Tribe talking about the need to address fuel loading along the border of the National Forest and reservation. Another topic of conversation was the use of both stewardship contracting authorities and the authorities offered under the Tribal Forest Protection Act. The Tribe worked closely with the agency at the planning, monitoring, and implementation stages. Planning was viewed as the most important role. Both parties involved in this project report being satisfied with their level of involvement and the Tribe wants to do similar work going forward.

### **RELATIONSHIPS OF AGENCY AND NON-AGENCY STAKEHOLDERS**

The project provided employment to tribal loggers during a period when timber markets were unfavorable due to a recent pulp mill closure and the recession of the last decade. The Forest Service personnel that liaised with the Tribe was recognized for their diplomacy and diligence in finding solutions to challenges, going over the details of the contract extensively. Tribal respondents expressed their gratitude for the agency representative leading this aspect of the project. The agency representative explained:

The Federal government has sovereign rights, the Tribe has sovereign rights, and both entities are protective of their rights, particularly the Tribes. And so, when you negotiate a contract with a tribal entity and the federal government, both parties are essentially, through that contract mechanism, agreeing to waive a very small portion of their sovereign rights in order to conduct a business transaction. Because, in a contract, you can get into a dispute and basically either party can file a claim against the other and when an entity has sovereign rights, they have to agree to let another entity sue them, so to speak....So, in this, it's very important that that contract, the terms of that contract, are fully understood. That there's complete honesty, nothing's hidden and that if there are any questions that it's admitted that, "We don't know this and we will find out." Because, to me, when dealing with the tribes, it's absolutely critical that there's trust and honesty there.... You are trying to come to a mutual understanding and agreement that both parties are very satisfied with. So, you have to just confront. If you don't know something, you have to confront it and get an answer that both parties can understand.

This individual also explained the importance of knowing Tribal laws and expectations when entering into a contract, something which the Tribe had been concerned about, in part because they acknowledge being considerably less bureaucratic than the Federal government:

I think it's really important that Forest Service personnel involved in that transaction, whether it be before contracts awarded or during the contract award process, I think it's really important that the Forest Service personnel be educated about tribal law, tribal rights, tribal sovereignty, as well as the information about the specific project, because that's very much in the minds of tribal representatives when they approach the federal government to negotiate a contract. They are very protective as they should be of their own rights. And if they know that you understand those and acknowledge those, then you're on the same page when you're starting to talk about negotiating the contract. You certainly need to understand where they're coming from and not. You don't want to approach them like you would a private contractor. That would be the wrong approach.

While timber output is important to project objectives, tribal participants express that the project could have been structured as an agreement and not a contract, and that they would have likely preferred this. Both interests shared similar objectives and both wanted the work done. Both the agency and the tribe expressed some awkwardness around signing a contract between a tribal entity and a Federal agency. Yet, since the tribe was not bringing cash to the project, it seems as though their role defaulted to that of a contractor and not an agreement holder even though technically an agreement could have been used.

#### ***EFFECTS OF RELATIONSHIPS ON THE SCOPE AND SCALE OF THE PROJECT***

The project did not increase in terms of complexity or scale because the agency essentially brought the project to the Tribe as a complete package. The Tribe plans to work on another contract with the Forest Service.

## Lolo Project III. Montana.

### **PROJECT OVERVIEW**

This approximately 2,000 acre Integrated Resource Timber Contract (IRTC) is part of a CFLR project, which itself is part of a much larger landscape conservation strategy in the Northern Rockies. The main objectives of this project are to restore habitat for threatened and endangered species—Canadian lynx, grizzly bear, bull trout, and other wildlife species—to reduce road density, and to reduce hazardous fuels near an area with dispersed homes. From initial concept development on to litigation and implementation the project has been ongoing for nearly a decade. Overall, the project is largely viewed as a success by agency and non-agency respondents.

### **INVOLVEMENT OF NON-AGENCY STAKEHOLDERS**

This project has taken place in an area where Forest Service staff engaged a diversity of the public early and often. Agency staff leads express that the best time to bring external stakeholders into the project is early in the concept phase prior to the detailed development and analysis of NEPA alternatives which is believed to primarily be an agency responsibility.

A preferred method of engagement was field tours and several were conducted at the start to help stakeholders visualize proposed activities. Site visits were accompanied by collaborative process meetings driven forward by a collaborative group operating Forest-wide. As the project completes scheduled activities, field tours are bringing people back out to these sites.

Forest Service representatives acknowledge that this type of early engagement improved decision making about the project, suggesting that *“because they were at the table, they brought that [knowledge of the local area and the landscape context] into the project design. And as we developed resource protection measures, we were really acknowledging that longer term plan of how management of the smaller piece of the landscape fit into the bigger landscape picture.”*

The collaborative group is the primary non-agency stakeholder, comprised of loggers, sawmills, conservation organizations, local community members, academic researchers, and staff from state and federal agencies. According to Forest Service staff on the NEPA ID team for this project area, rather than being involved in detailed project design, the primary non-agency collaborators were largely involved *“more project concept, project location, and project design. Not necessarily into the details of designing what actually occurred under the project.”* Other non-agency stakeholders were involved in the regulatory review process, e.g. Endangered Species Act consultations.

The collaborative process used for this project is directly linked to those processes used across the greater CFLR project. Much of the early collaborative engagement on this stewardship project focused on the application of forest restoration concepts established for all of western Montana in a manner intended to achieve landscape-scale objectives of improved habitat quality and connectivity, as well as improved forest health and resilience. Due to a fiscal connection to the massive 10-year CFLR project, non-agency stakeholders evaluated this individual project based on its tie back to the landscape and collaborative objectives of the CFLR project. Describing their involvement in project conceptual design and resource allocation, one non-agency participant described their role as:

Looking at the project to see, 'Is the Forest Service providing a good outreach- are they collaborative with the group assembling that, are they just telling us what they want to do, or are they asking us what we think it should look like?' And that's really the whole CFLR program is to try to help move toward that collaborative model as opposed to just the communication model.

Another non-agency respondent described their role as being that of diplomat between the Forest Service and various non-agency partners, suggesting, *"a lot of what we do to help the Forest Service is try to bring more people to the table...we try to be very friendly and welcoming."* A Forest Service representative recognized the value in this, *"that's how I think non-agency stakeholders can be most beneficial to us; recognizing where community values are; recognizing where there's zones of agreement and where the priorities on landscape should be for forest management."* In this project, these strategies for meeting the varied expectations of the diversity of interested stakeholder, did not always work.

As this stewardship contract involves a commercial timber harvest component within an important area for wildlife, not every stakeholder supported the project. Despite the endorsement of state and federal wildlife biologists, some environmental groups questioned whether a commercial timber harvest was an appropriate mechanism to achieve habitat goals. Some of these stakeholders expressed feeling that they had not been engaged effectively, in part because the process was so lengthy and meetings logistically difficult for them to participate in. Others observed that these groups did not regularly attend the field tours. Given the varied positions on some of the more central, yet divisive elements of the project, some participants expressed doubt that any level of engagement would have resolved contested views that surfaced as the project progressed.

Disagreement around the objectives and need for this project emerged and this eventually materialized into a legal dispute led by "serial litigants" not affiliated with the collaborative process. Litigation is still ongoing with a number of environmental groups filing suit and legal briefs in an attempt to stop the project. On the opposite side, most members of the collaborative group and several other organizations filed briefs in support of the project, including two national conservation groups, the county government, forest industry, and state agencies. Litigants contend that the initial NEPA analysis failed to address cumulative impacts to threatened and endangered wildlife and that the Forest Service did not follow all the necessary procedures related to the National Forest Management Act and Endangered Species Act. Other non-agency participants doubt these claims and express disappointment that groups resorted to these tactics, but say that it has only galvanized their resolve to work on projects like this one.

During the legal review, one official member of the collaborative group broke off to side with the litigants. An agency participant reflected on this saying:

I think they [the break off group] felt that they did not participate enough in the collaborative process that they should've been more involved in the design and the details of the project and therefore, at the end did not support it as much....It shows that, even though you think you have consensus and their support, there's always a potential for these individual interests to move away from the consensus table.

### **RELATIONSHIPS OF AGENCY AND NON-AGENCY STAKEHOLDERS**

In western Montana, a common vision and desire for landscape-scale conservation appears to be driving people to work together on individual projects. In this one, the commitment to work together was propelled forward in the use of a regionally defined set of restoration principles as a means to framing project objectives and design. The funding from the CFLR program is recognized as an important element of keeping people at the table, because they see the potential for their goals to be accomplished.

Others less philosophically aligned view a trend in collaborative governance as a threat to their interests and in this project this resulted in resorting to strategies to slow this momentum down. Many project participants identified relationships between the agency and the external stakeholders as hinging entirely on effective communications. These communications sometimes happen more effectively through middlemen organizations and sometimes the use of this strategy limits relationships from developing. Participants identified the main challenge to building relationships is the need to constantly keep open and consistent communications going throughout the lifespan of the project. As one participant said, consistent communications between the agency and external partners “*offers a chance to, when you do have a departure, a chance to talk it through before you go too far. Like into litigation.*” Some identified that it is difficult for volunteers to participate on a regular basis.

### **EFFECTS OF RELATIONSHIPS ON THE SCOPE AND SCALE OF THE PROJECT**

The project size was defined by the partners early on. All participants interviewed about this project said that it was made more complex by the relationships involved. More people engaging meant that communications were required to be broad, open, and consistent. The nature of the management objectives, which themselves were driven in part by collaborative engagement by many stakeholders made this a complex project. Both agency and non-agency participants pointed to the difficulty in maintaining communications and relationships when people involved have varying interests, expectations, and levels of education. Just finding a common lexicon is a challenge.

## **Bighorn Project. Wyoming.**

### **PROJECT OVERVIEW**

This project was in development for more than 13 years. First conceived as a timber sale in 2001, the original project was reduced to half of the proposed size because it contained inventoried roadless areas under the 2001 Roadless Rule. Following this the Forest Service reconfigured the project into a 9,800-acre stewardship contract, which included 1,600 acres of mechanized hazardous fuel reductions around a private club, an inholding consisting of more than 20 private residences. The Bighorn National Forest has emphasized stewardship contracting in the Forest Plan as “*one of the approaches we should be trying to do on every project,*” remarked one agency employee interviewed about the project. Fire risk reduction activities in this stewardship contract were first identified in the Sheridan County Community Wildfire Protection Plan.

The environmental assessment for the project was completed, and the preferred NEPA alternative selected, in 2009. The contract was awarded in 2014 to a Montana company. An agency respondent recognized that the project benefited from Montana sawmills lacking a local timber supply and being willing to pay for timber produced in Wyoming which lacks markets. As such, the Forest Service expects to have significant receipts retained at the end of the project. The project area is dominated by Lodgepole pine (77% of the total project area) with Spruce stands comprising an additional 17%, and the remaining 6% of the project area being grasses and rock. Goods for services and retained receipts are the stewardship authorities that will be used to at least partially cover the expense of pre-commercial thinning and biomass removal, mastication, or piling of biomass.

### **INVOLVEMENT OF NON-AGENCY STAKEHOLDERS**

This project does not have a standing collaborative group associated with it. Rather, the Forest Service engages non-agency stakeholders with immediate interests in the project area through individualized communication channels (e.g. one-on-one conversations) and joint communication (e.g. scoping letters and two scoping meetings). At the time this project was first conceived, the Bighorn National Forest was undergoing a Forest Plan revision and many of the stakeholders engaged in this project were also engaged in the Forest Plan revision process. This was the initial basis for non-agency stakeholder engagement. Non-agency stakeholders engaged in this project include:

- Private inholding club: pre-NEPA scoping, NEPA scoping, subsequent discussions
- Range permittees: NEPA scoping
- Owners of a reservoir in the project area: NEPA scoping
- ATV groups: NEPA scoping
- County Fire Warden: NEPA scoping and project planning
- Wyoming State Forester: NEPA scoping and project planning
- Wyoming State Forestry Agency: NEPA scoping, project planning, development of a Forest Stewardship Plan for the private inholding,
- Wyoming Game & Fish Department: NEPA scoping and project planning (examined hunting access and possible impacts to elk populations)
- Wyoming Recreation and Trails: NEPA scoping and project planning

### ***RELATIONSHIPS OF AGENCY AND NON-AGENCY STAKEHOLDERS***

Agency personnel suggest that the project got the Forest Service into discussions with several non-agency cooperators each identifying specific interests of their own. The agency addressed each of these interests through the NEPA scoping process. Beneficial outcomes of this interaction as cited by agency personnel included that non-agency personnel became more informed about the rules governing National Forest management and the purpose and benefits of management activities.

Still, some non-agency stakeholders were not happy with the project. The ATV group was displeased by some of the proposed actions but recognized the need for the project. The most significant interaction centered on the relationship between the members of the club comprising the private inholding and the Forest Service. The agency suggests that the club had been involved from very early on pre-scoping and that until this project this stakeholder had not engaged the Forest Service before. Respondents suggested that during scoping the club members cited visual concerns related to cutting right up to the boundary of the inholding. A formal objection was filed by one club member. The Record of Decision selected an alternative that cut up to the National Forest boundary.

Agency personnel stated that within the club there is not universal agreement on the proposed activities of the project with a majority being supportive and a minority opposing the cut design. Those opposed question the need for all proposed actions and these individuals oppose harvesting of trees directly adjacent to their private property. As a result, an objection was filed after the EA was released.

### ***EFFECTS OF RELATIONSHIPS ON THE SCOPE AND SCALE OF THE PROJECT***

Agency personnel do not feel that non-agency stakeholders have affected the scale of the project although it is clear that certain non-agency stakeholders are attempting to alter the scope of the project. Misgivings were expressed through a formal objection and through subsequent communications following the Record of Decision for the selected alternative under the NEPA process.

## **Black Hills Project I. South Dakota.**

### ***PROJECT OVERVIEW***

This project was a relatively small timber driven stewardship project. The project did not have a standing collaborative group associated with it.

### ***INVOLVEMENT OF NON-AGENCY STAKEHOLDERS***

There is no collaborative process associated with this project and public outreach consisted of a scoping letter. According to the agencies' NEPA coordinator there were six parties that submitted comments during the scoping period: two state agencies, the county, one tribe, and two trade organizations. There was an administrative appeal filed by an environmental group. The Wyoming State Forestry Division also reportedly participated in monitoring project activities.

### ***RELATIONSHIPS OF AGENCY AND NON-AGENCY STAKEHOLDERS***

According to respondents agency to non-agency relationships existed prior to the project and the project has not measurably changed these relationships. Projects on the Black Hills National Forest have a history of appeals. The timber industry is fairly strong in the region and projects tend to be timber oriented and an agency respondent noted that, "*the bigger companies have not shown an interest in going into stewardship,*" because of this.

### ***EFFECTS OF RELATIONSHIPS ON THE SCOPE AND SCALE OF THE PROJECT***

Agency personnel stated that non-agency stakeholders do have an impact on the scale of projects and that the agency will add or subtract acreage depending on the comments they receive through NEPA scoping.



## **Black Hills Project II. South Dakota.**

### **PROJECT OVERVIEW**

This project is the first under a 10-year master stewardship agreement between a county government and the Forest Service. Stewardship agreements are a new thing for both parties. The project spans National Forest and county roads. The primary project objective as articulated by the Forest Service representative is to “*facilitate this relationship that we have with the county,*” around implementing work adjacent to roads related to areas of common interest; weed management and hazardous fuels, to improve public and firefighter safety. A representative of the county cites additional project objectives: create a fuel break along key egress roads in the Black Hills, opening the canopy to allow more snow melt along the roads in the winter time to decrease required maintenance by the county, and to reduce wildlife and automobile collisions by opening up visual corridors.

The stewardship agreement was instituted to formalize the working relationship, to delineate a program of work, and facilitate fiscal efficiency. The project involves removing hazardous trees from a stretch of road. Overall, the project is largely viewed as a success by agency and non-agency respondents.

### **INVOLVEMENT OF NON-AGENCY STAKEHOLDERS**

A natural resource professional from the county worked with the Forest Service to identify appropriate weed management techniques and to coordinate administrative activities between the agency and the county. According to the Forest Service representative for the project, “*this road lent itself to our first kind of a test the waters type project.*” County Commissioners were involved in establishing the master stewardship agreement, but to a lesser degree in the day-to-day implementation work associated with this supplemental project implemented under the master agreement.

The county point of contact has helped shape the project with additional technical knowledge in weed management and by administering the bid process for subcontractors implementing the timber removal and weed management. The Forest Service representative suggests that the administrative support helped move the project along significantly quicker.

### **RELATIONSHIPS OF AGENCY AND NON-AGENCY STAKEHOLDERS**

The NEPA analysis was completed by the Forest Service prior to the agreement being developed, and the county was not involved in that part of the project. Forest Service representatives were looking for a straight-forward project to partner with the county on so the decision was made by the agency to work in a place where NEPA was complete and where timber production is a secondary objective. Thus pre-NEPA planning really was not a facet of this partnership.

The agency approached the county with the idea for the project, through “*cursory conversations*” focused on a common objective and began to draft a master agreement based on these conversations. The agreement was initially drafted by the Forest Service and the final agreement based on mutual revisions and legal review. As the agency representative explains, “*we conceived that idea, and pitched it to them, and then they bought in, and that's how it happened.*” On the side of the county, one individual in particular pushed for the County Commissioners to pursue the stewardship agreement.

As the project progressed the Forest Service and main contact at the county have worked more closely together and the relationship grew with more frequent interactions. The Forest Service hosted numerous field trips to the project site with significant public interest. This engagement has increased the number of individuals interested in the project. Going forward, project participants anticipate that additional projects coming forth from this master agreement will involve more interests in project planning, including wildfire agencies and private landowners within this fragmented ownership landscape.

***EFFECTS OF RELATIONSHIPS ON THE SCOPE AND SCALE OF THE PROJECT***

The project grew in size as a result of the involvement of the county but did not increase in complexity.

## Medicine Bow Routt Project. Colorado and Wyoming.

### **PROJECT OVERVIEW**

This is a very large 10-year contract between the Forest Service and a forest products company. One Forest Service staffer working to develop this project identified the following objectives: (1) to utilize low value trees killed by the recent pine beetle epidemic; (2) to lower per acre treatment cost by guaranteeing a supply over a 10-year period; (3) to promote establishment of an industry that could utilize biomass; (4) to mitigate unacceptable fuel loading associated with all of these dead trees, especially in the wild land urban interface; (5) to treat the safety hazards that are associated with falling dead trees along public travel corridors, and; (6) to begin rehabilitating subalpine and montane forest types to a condition more resilient to insects, disease, and other disturbance mechanisms. With an over 1 million acre disturbance from the Mountain Pine Beetle, the Forest is devising strategies to maintain a diversity of age classes over the next century.

Other respondents suggest that the project objectives are:

To remove dead and dying Lodgepole pine hazard trees. Most everything that we do, probably 90%, 95% of it, is hazard tree removal along road sides, so we can keep Forest Service roads open and clear for the public, so people aren't getting trapped behind falling trees, or hit by falling trees, while as they're traveling down the road.

- Forest Service respondent

To supply our mills with affordable, top-quality feedstock and also bring the benefit to the US Forest Service on places where there is no value....It's basically to supply our plants with a good quality, long-term supply of affordable wood and as well accomplish for the US Forest Service some of that, their ability to utilize this low-value wood, no-value wood that they need to get rid of that there's virtually no market for.

- Contractor

To utilize multiple merchantable forest products, specifically biomass and non-saw timber products to get work done that we normally can't get done under regular timber sale contract, and also to try to get a better cost for that work, and then of course, to support industry development and maintain industry, forest products industries....to get a bunch of work done on the ground utilizing material that we typically have a hard time utilizing, and that helped further develop industries in the area.

- Forest Service respondent

### **INVOLVEMENT OF NON-AGENCY STAKEHOLDERS**

Agency respondents suggest that the most important role for non-agency participants is to be engaged in the planning process and through one-on-one communications. The latter was the way non-agency stakeholders participated in this project. There was little open planning and scoping, in part because the project came to be through the use of a categorical exclusion (CE) from needing to complete an Environmental Assessment under NEPA. This is because the project falls under recent legislation around addressing the massive beetle kill in the Rockies. "We're not talking about an EIS, where we had environmental groups involved and stuff. It wasn't that kind of collaboration," remarked an agency interviewee.

Aside from the contractor, nearby private landowners are the only other non-agency stakeholders identified as being directly involved. While the Forest Service wanted to do something in the area, an agency respondent suggested that the contractor had “*aggressively pursued*” the project and that as part of their association with a regional group promoting economic development and biomass utilization, “*they lobbied through this [the regional biomass group] for a long time....For something in their area specifically.*” This same Forest Service respondent said, “*We’re a huge supporter of it, for over previous years, in trying to get it prioritized.*” The Forest Service supported the idea because there is limited capacity to make use of the hundreds of millions of beetle killed trees in this part of the Rockies. When asked if the project had other support locally outside of the agency beyond the contractor and economic interests, this agency representative offered, “*Yeah. ‘Ish.’....There is probably a 50:50 on, for and against.*”

Agency and Congressional support exists for this project in large part because of a desire to reduce fuel loads and remove hazard trees. This resulted in the push for a long-term contract for providing low value wood to the facility meeting little, if any, resistance. The contractor “*bid very low*” on the contract, which in turn was awarded mostly on price, as the contractor has no prior experience with any Forest Service contracts, and the Forest Service was looking to reduce per-acre treatment costs. This is some of the only wood processing infrastructure in the area.

In turn, the contractor’s plan was to sub-contract the logging work since they did not start out with any capacity of their own. Yet, given that other large stewardship projects in the region are more established and able to offer greater compensation to a limited regional labor pool, the contractor was not in position to retain a dedicated workforce to accomplish the task orders consistent with the timeline. The project struggled with this for at least the first two years. “*There’s not enough loggers...we all know it, we can’t get work done....it’s happening to other companies that had contracts also,*” said an agency representative.

#### **RELATIONSHIPS OF AGENCY AND NON-AGENCY STAKEHOLDERS**

Since this was a new relationship for the contractor and the Forest Service there has been a considerable learning curve. The Forest Service recognizes, “*we took a risk but they gave us a very good price.*” Still, for the Forest Service, getting a low price up front meant needing to subsidize the project on the back-end with additional staff time. The newness of the contractor to the world of Forest Service contracts also had an impact. As the project got moving respondents suggest that communication techniques improved to address challenges as they came up. Agency representative now engaged in the project suggest that they are in very regular communication with the contractor and together work out changes in the location and timing of harvesting.

According to an agency representative:

I think there are some benefits to the longer term, some for the Forest Service and some for the person that we’re contracting with, too, because I think it gives them a little more assurance that they’re gonna have a 10 year contract and they’re gonna have a steady flow of products coming in. And also that we’re going to be giving them some revenue flow through the contract going into their business so I think that gives them some stability for

a 10 year period. Where, with some of the shorter ones, one to three years, they don't quite have that assurance. So I think that helps them, it also helps the Forest Service if we get a good contractor that we know we're gonna have that person for a 10-year period, so I think that's a benefit to us, too, because once you kind of build those working relationships with someone, and that takes a bit of time to do, it's good to carry those forward for a little longer term. So I think that's a benefit to the longer term, as well.

The contractor is structuring a lot of decisions and is driving how the contract is being implemented. Early on the contractor failed to meet the resource management objectives and needed some hand holding. Reflecting on these failures, a Forest Service respondent said, *“we should have put a lot more emphasis on the relationship and partnership building upfront, to make this thing work in the long-run. We basically had to develop a relationship.”*

#### ***EFFECTS OF RELATIONSHIPS ON THE SCOPE AND SCALE OF THE PROJECT***

The project objective of treating areas outside of hazard trees has not progressed. The timeframe and size of the project were both heavily influenced by the contractor. The project guarantees that the Forest Service will put up at least 1,000 acres each year. A Forest Service representative reports they are skeptical of long-term contracting based on their experience with this project but did see some positives, saying *“There's a lot of good things that came out of it in my tenure with it. And it can work really well, but we just...We, most times, don't have our act together enough to really do what's needed to make something work smoothly.”*

## Nez Perce Project. Idaho.

### **PROJECT OVERVIEW**

This project is more than 1,000 acres and was nearly 10 years in the making. Objectives include: fuels reduction, vegetation management, watershed restoration, habitat improvement, road decommissioning, and recreational considerations. The use of stewardship contracting was not explicitly considered at the early stages of project planning. Overall, the project is largely viewed as a success by agency and non-agency respondents.

### **INVOLVEMENT OF NON-AGENCY STAKEHOLDERS**

Primary non-agency stakeholders are a group of motorized recreation access advocates and a collaborative group focused on a single large watershed. Participation from these two groups consisted of NEPA scoping and multiple field tours of the project area. As projects on this Forest move to implementation these partners are usually significantly less involved.

### **RELATIONSHIPS OF AGENCY AND NON-AGENCY STAKEHOLDERS**

The collaborative group was in its early development when the project started and by all accounts their interactions and communications with the Forest Service were strengthened. For instance, more regular communication helped equalize understanding of agency jargon and policies, allowing for more constructive communications.

A Forest Service project participant noted that while collaboration has strengthened how they work with external stakeholders in scoping projects, the decision authority for much of what the agency does resides solely within the Forest Service. *“Things can't be delegated off or even influenced [pause] they can be influenced, but the ultimate decision in some of the implementation things are ours, and we have to own that and they need to understand that.”*

### **EFFECTS OF RELATIONSHIPS ON THE SCOPE AND SCALE OF THE PROJECT**

An agency representative involved in this project suggested, *“non-agency participants made the line officer and the ID team aware of their objectives to have a large and integrated project,”* suggesting that stakeholders external to the agency pushed for a larger project that included some of their objectives and this indeed transpired.

## **Idaho Panhandle Project. Idaho.**

### ***PROJECT OVERVIEW***

This is a smaller project (less than 700 acres) focused on forest restoration and fuels reduction in a municipal watershed. The project has been ongoing for over five years and is embedded within a Collaborative Forest Landscape Restoration (CFLR) program project. The main non-agency stakeholders are from the local community and are engaged through a collaborative group with 15 core members consisting of environmentalists, landowners, farmers, water district managers, and local community members. A fire in the area became the catalyst for action. The collaborative approached the Forest Service about the project because there were concerns about the possible negative impacts forest conditions could have on downstream water users.

### ***INVOLVEMENT OF NON-AGENCY STAKEHOLDERS***

Non-agency stakeholders are principally involved through the collaborative group which has been established for over a decade. Through the course of this project collaborative meetings occurred four times annually. Activities have included scoping, planning, monitoring, and accessing outside funding. The industry members of the collaborative are also involved in implementation. Participants emphasized that the most important aspect of their involvement in the project is to keep open and transparent communications and for each member to be upfront with introducing issues for broader consideration by the group. Respondents believe that the diversity of interests involved in the collaborative group contributed to better project design and outcomes. The group also has a depth of understanding with timber harvest operations which is an important aspect of meeting project objectives.

### ***RELATIONSHIPS OF AGENCY AND NON-AGENCY STAKEHOLDERS***

The agency trusts the collaborative group and relies on the group for a lot of leadership and direction; for instance, this project was originally put forward by the group. While the collaborative group is the main non-agency stakeholder, this project was mostly spurred on by the County Commissioner and the local water district, which included the project in a CFLR proposal prior to the collaborative group leading it. On the effect on the quality of relationships, non-agency participants in the group expressed:

It's about the local community and the fact that we are getting more and more projects through that contributes to the quality of relationships. More and more economic opportunities;" "A process that involves as wide a group as we can. That is what does the best job. Strong people and good leadership keep things moving;" "I think cultures are changing within Federal agencies and they look forward to sharing what they are doing as opposed to. Prior to [the collaborative group existing] the USFS would come into my community and this is how contentious it was, the USFS would need to bring security.

### ***EFFECTS OF RELATIONSHIPS ON THE SCOPE AND SCALE OF THE PROJECT***

The scale of the project was not affected by non-agency participation but the internal debates of the collaborative group did shape the scope of activities and treatment design.

## SOUTHWEST REGION

### **Grand Mesa, Uncompahgre and Gunnison Project. Colorado.**

#### ***PROJECT OVERVIEW***

This is a large IRSC with a very active collaborative group called the Uncompahgre Partnership. The project area is considered to be high departure from historic fire regimes and has experienced multiple insect infestations over the last decade. Activities such as mechanizing thinning, timber harvesting, seeding, weed treatments, managed fire, and decommissioning of roads are intended to allow the use of fire as a management option for the Forest.

Scoping for the project began in 2012 and project implementation began in 2013. The project is a component of a 2010 Collaborative Forest Landscape Restoration Program (CFLRP) project. Monitoring by the collaborative group has been integrated into the design of treatments. Under this project both mechanical thinning and controlled burns are to occur across 136,079 acres of National Forest within portions of 39 separate watersheds. The project also involves treatments on more than 5,000 acres of private land.

#### ***INVOLVEMENT OF NON-AGENCY STAKEHOLDERS***

Non-agency stakeholders interviewed for this project consider themselves to be local to the project area. One individual interviewed has been involved in three separate stewardship contracting projects including this one. For this project the individual is involved with monitoring ecological indicators and coordinating the collaborative group. This non-agency stakeholder remarked that their organization lacks capacity to further engage in other stewardship contracting projects beyond participating in NEPA scoping, writing grants for coordination of the collaborative group, and participating in monitoring activities.

The other non-agency respondent had not been directly involved in stewardship contracting projects, but has been involved in collaborative meetings and through purchasing saw logs being made available from the project. This individual possessed a negative view toward the concept of stewardship contracting on a philosophical basis. The main non-agency stakeholder identified is the Uncompahgre Partnership. This group, which was established in 2001, has engaged in this project through NEPA, monitoring the project, and providing funds for non-agency coordination.

#### ***RELATIONSHIPS OF AGENCY AND NON-AGENCY STAKEHOLDERS***

When asked if relationships between the Forest Service and non-agency stakeholders changed as a result of the project, a representative of the collaborative group suggested that new stakeholders have gotten involved as the project progressed and that agency and non-agency cooperators are listening to each other. This non-agency stakeholder suggested that by working together the collaborative group is getting to know, trust, and respect the different partners for their respective knowledge, skills, and input and that the relationships have improved the more time the partners spend working together. He also



cited more scientific research being active in the landscape as a positive development because it is having a role in informing agency decisions and the direction of the project.

Conversely, the representative from the timber industry who was interviewed suggested that stewardship contracting strains relationships with the timber industry, but stated that otherwise, working relationships are good and that he is encouraged by the progress of the collaborative group. Agency personnel interviewed suggested that each individual organization engaged in the project as well as the project itself, is growing stronger because of the time spent working together.

#### ***EFFECTS OF RELATIONSHIPS ON THE SCOPE AND SCALE OF THE PROJECT***

An agency interviewee who has been involved in the project for two years suggested that the involvement of non-agency stakeholders impacts the scale of the project and has made it larger, saying it *“definitely gives us some more buy-in and trust, I think, from the public when they see our different external cooperators kind of behind us saying similar things to us, and maybe even encouraging us to do more.”*

Non-agency personnel involved in the project and the collaborative group responded that yes, indeed the scale had increased and that the project had grown larger due to the involvement of non-agency stakeholders in the project. They also stated that when the Forest Service has listened, relationship dynamics and what subsequently happens in the project are affected. The interviewee from the timber industry suggested that in general other stakeholders (environmental rather than timber interests) tend to make most projects smaller.

## **San Juan Project. Colorado.**

### **PROJECT OVERVIEW**

This is a small IRTC project focused on regeneration of an older aspen stand via harvest. A secondary objective of the agency is to support two local industries that use aspen. The initial planning for the project began 6 – 7 years ago.

### **INVOLVEMENT OF NON-AGENCY STAKEHOLDERS**

The agency completed basic outreach to local environmentalists, a national fish habitat conservation group, and local tribes but there was no collaborative involvement through regular meetings. A workshop was held to look at multiple ways to treat aspen. When asked about the most challenging aspects of involving non-agency participants in this project, an agency respondent suggested:

I guess just, trying to figure out how to get people involved or what level of involvement is...That we're supposed to be doing. Or, I guess, to me like the whole concept of collaboration is great. But that, basically...Again, to me, means you're working together with somebody to achieve a common goal. And if you can't really ever figure out what that common goal is, how do you collaborate?...And some organizations are just kinda fundamentally opposed to parts of our agency mission and we can hear concerns and all that, but if you just knock on the same page, fundamentally how do you work together?

Some disagreement has occurred between interests around the type of regeneration practice to use; prescribed burns versus timber harvests. One agency respondent described why they felt it is important to involve multiple stakeholders:

If you're trying to move a project forward as quickly as possible without litigation, etcetera, then you really need to have as....diverse a stakeholder process right from the get-go. So that's really important. I mean where you're seeing litigation on these things, and this is frankly where a lot of these Congressmen are missing the point here, is when....You go fast lane, push forward, and without people, without the community taking a look at it together, that's when you run into litigation....There's one place up here at Pike San Isabel, it's being litigated right now....because the Forest Service didn't really engage the public that well, and they come up with these prescriptions that are either too broad in nature or not very site specific, so people really don't know what's going on, and that's when you run into problems....And you have to get it really drilled down, take the time, get people involved, and be specific enough geographically, and prescription wise, then you can move forward and that's been true on the East Side of the San Juan National Forest where now lots of work is getting done on the ground.

This respondent suggests that non-agency stakeholder engagement is important for multiple reasons, mentioning reducing the chance of litigation and increasing the ability to secure funding for projects. This same respondent suggests that engagement of non-agency participants should extend beyond the Federal lands to include those interests that pertain to non-federal lands as well.

### ***RELATIONSHIPS OF AGENCY AND NON-AGENCY STAKEHOLDERS***

Transparency and integration of science are viewed as important factors for involving multiple interests in decision making. As one agency respondent put it:

If you don't have, it's not science-based, you're not working with contemporary information being enforced or changing so much, then you're out of date with it, you can't make good decisions. But if you have that good information like that's science-based and you're working in a transparent situation exchanging the information, even if you disagree about it, you can at least, there could be the give and the take and the compromising to find something that is agreeable for as many partners as possible.

### ***EFFECTS OF RELATIONSHIPS ON THE SCOPE AND SCALE OF THE PROJECT***

This is a small project of limited scope and scale. Non-agency stakeholders got involved by helping to evaluate a few different ways of regenerating aspen, but little to no deviation from the original idea emerged. A one-day science workshop likely improved decision making and augmented what the Forest Service plans to do beyond this project but did not really change this project. Moreover, the project was not affected by the involvement of non-agency stakeholders. The agency stated that the project was going to be completed regardless of any non-agency input:

Has it increased the size or scale of it? No, I think, we tried to do what we felt like was the right thing to do, and I don't know that this process, or using Stewardship made us really do anything different. It was just a different way of getting done what we thought we should be trying to get done.

## **Pike-San Isabel Project. Colorado.**

### **PROJECT OVERVIEW**

This project is more than 700 acres and its objectives are to reduce the risk of high severity fire occurring in a municipal drinking water source watershed for Denver, Colorado by removing hazardous fuels. The project also intends to reduce fire threats to a community. Partners pulled together following a large severe fire which had the potential to significantly impact Denver's water supply. Overall, the project is largely viewed as a success by agency and non-agency respondents.

### **INVOLVEMENT OF NON-AGENCY STAKEHOLDERS**

The primary non-agency stakeholders are a municipal water provider who helped fund the project and prioritize sites for implementation. All respondents acknowledge that the funding provided through the water provider's rate-payer billing program is essential for projects like this to move forward. Linked to this funding is a restoration effectiveness monitoring program designed and implemented by university-affiliated scientists. A representative of the water provider suggests, *"it's very important for [the water provider] through this partnership and through the monitoring to show that there is a return on the investment."*

### **RELATIONSHIPS OF AGENCY AND NON-AGENCY STAKEHOLDERS**

Non-agency participants suggest that the process of working together to prioritize and plan treatments with the agency and use monitoring data to support adaptive management has allowed them to build public buy-in for this type of work in the watershed. A representative from the water provider states that a stream of projects has improved relationships, suggesting that relationships improve over time and not necessarily because of interactions from any single project. Learning about how to improve contracts is incorporated into new projects. As the respondent asserts, *"it's because of these successful projects that highlight the need to partner and to move forward with implementation."*

However, a respondent from the agency was unsure of when and at what project stages non-agency stakeholders were engaged. A non-agency stakeholder hinted that this misunderstanding of the depth of engagement by non-agency stakeholders is due partially to the fact that agency capacity *"continues to dwindle while their responsibilities seem to go up, so engaging with outside folks is difficult for them to do."*

### **EFFECTS OF RELATIONSHIPS ON THE SCOPE AND SCALE OF THE PROJECT**

Effective personal relationships enabled this individual project to be implemented on National Forest lands while adjacent private lands are also treated. The "all lands" nature of this work added to the complexity and diversity in the treatments in the project. The agency attributes the increased scale to the fact that the municipal water provider is contributing significant resources for implementation and monitoring.

## Coronado Project. Arizona.

### **PROJECT OVERVIEW**

This project is envisioned as a 10-year project on 3,705 acres. The impetus for fuel reduction and restoration activities in the project goes back to the mid-1990s and early 2000s when large wildfires and progressive insect infestations reduced wildlife habitat in the area. The Mexican spotted owl and a Mount Graham red squirrel – both species are endangered – have viable habitat on the mountain. After years of discussion, the current implementation vehicle for the project is a stewardship agreement with the National Wild Turkey Federation (NWTF). NWTF is accomplishing the timber unit layout and cruising with a sub-agreement with a regional Apache tribal group that the Forest Service certified to do the cruising. The project will use skyline logging at a reported cost of \$1800/acre.

A 2010 Collaborative Forest Landscape Restoration (CFLR) program proposal for the project area identified a long-term trend in partnerships toward collaborative restoration originating from the creation of a collaborative group in 2006. The partnership convened around the idea of using the by-products of forest restoration as a means to offset treatment expense. A related collaborative effort between scientists is also cited as important to the overall project.

### **INVOLVEMENT OF NON-AGENCY STAKEHOLDERS**

The following entities (and respective roles) were specifically mentioned by respondents as non-agency stakeholders in the project:

- Graham County Commissioner: mentioned in interviews but role not defined
- Graham County Community Investment Fund: implementation
- Eastern Arizona Small Business Development Center: implementation
- Cecil Logging and Joe's Logging: contractors, implementation
- National Wild Turkey Federation : implementation partner, contract holder
- Arizona Department of Transportation: mentioned in interviews but role not defined.
- Sky Island Alliance: scoping, project planning, NEPA, implementation
- Gila Woodnet/Restoration Technologies: project planning, implementation
- Western Apache Tribe: wood utilization, scoping, project planning, NEPA, implementation, and monitoring
- National Network of Forest Practitioners/Center for Cooperative Forest Enterprises: implementation
- Arizona Game and Fish Department: scoping
- US Fish and Wildlife Service: scoping
- Homeowners Association: scoping, NEPA
- Gila Watershed Partnership: scoping, NEPA, planning, implementation
- Pinaleño Partnership: planning, NEPA, implementation, monitoring

### **RELATIONSHIPS OF AGENCY AND NON-AGENCY STAKEHOLDERS**

One non-agency stakeholder stated that relationships between the agency and its non-agency collaborators “get better all the time,” and that there have been long-term contacts with the Forest Service over the last eight or nine years as the project has developed. Other non-agency interviewees

characterize relationships with the agency and non-agency stakeholders as being “*positive interaction*” with a focus on “*a lot of common ground.*”

At least two non-agency interviewees remarked that they would like to be involved in the collaborative process if they had more time to do so. A Forest Service representative interviewed suggested that as the project has changed from the planning phase, through NEPA, and now on to implementation, there is a need for different roles which has created opportunities to bring in new partners.

***EFFECTS OF RELATIONSHIPS ON THE SCOPE AND SCALE OF THE PROJECT***

An agency employee interviewed expressed that the scale of the project was restricted by the Record of Decision and the complexity of the project and that it has been difficult to deviate from this during implementation. They noted that other projects related to this specific project have occurred under the branding of “Firescape,” a more landscape-level approach to managing fuels in other areas of the Coronado Forest that have fewer issues with endangered species habitat. Non-agency interviewees stated that the scale was determined by the NEPA EIS and that scale is further limited by time and funding available to conduct treatments.

## **Coconino Project. Arizona.**

### **PROJECT OVERVIEW**

This is a smaller stewardship contract focused on restoring an alpine meadow habitat by removing encroaching coniferous trees, reducing wildfire risk, and restoring watershed function. The project itself does not have a collaborative group but occurs within a landscape that has a long history of collaboration. This project is viewed as a key stepping stone in a larger regional forest restoration strategy, the Four Forest Restoration Initiative (4FRI).

### **INVOLVEMENT OF NON-AGENCY STAKEHOLDERS**

The private landowner adjacent to the project site is a conservation organization which initiated the project to promote habitat restoration and reduced wildfire risk to their property. This landowner was involved in scoping, planning, implementation, and monitoring. The relationship with the agency occurred through one-on-one communications with the agency project lead.

Larger collaborative efforts that exist within the region have established diameter limits for tree harvesting which remain controversial. This project is an instance where the restoration objective involves removing trees larger than the diameter limit and the project was used as a learning opportunity for all involved to identify instances where diameter limits can be relaxed. The project also served as a demonstration site for the application of designation by description, a stewardship authority that is sometimes more controversial. Both of these issues have been flash points for collaborative groups operating in Northern Arizona and elsewhere.

Field trips, demonstrations, and multi-party monitoring have all been used in this project and contribute to trust building. Given to the fact it is “so well designed,” this case study project has been used by the broader group of regional stakeholders to test and evaluate restoration principles and science in a smaller project before transitioning to implementation at much larger scales. Environmental groups participated in the project design and this is believed to have contributed to there not being any appeals. Moreover the project is generally viewed as being a very well designed in large part because it integrates science and diverse perspectives, and directly involved widely regarded restoration scientists in the design process. As one non-agency participant put it:

The project design that the Forest Service used with stewardship contracting was integral to making a very good project....It was key. It was key, I'll say it. It was a strategically key part of having this project be acceptable to the environmental community, the logging community, the wildlife community, the grassland community, All those groups that have a strategic interest in this project therein.

### **RELATIONSHIPS OF AGENCY AND NON-AGENCY STAKEHOLDERS**

Respondents believe that the project improved relationships between the Forest Service and adjacent landowners by helping them learn to plan and implement together. Specifically, an agency respondent said:

The [conservation group that owns land adjacent to the project site] is very involved with a lot of stuff we're doing. In fact, next week, we're working with them on a

different project on trying to help prescriptions in 4FRI get implemented by doing, working with some tablets that they think are, would be beneficial for operators to have in their machinery to better meet the designation by prescription, that we have the authority to use now in 4FRI. And without the previous collaboration, I think present collaboration would've not been available.

Indeed other respondents suggest smaller projects like this one enabled a culture of collaborative work that spawned larger efforts like the Four Forest Restoration Initiative. The key factor that interviewees suggest contribute to the nature of the relationships around this project is transparent communication:

I think they have changed a little bit, because like I said, [the Coconino NF project] was a great example of how the Forest Service interacted with others, and I would say that they've improved based on [the Coconino NF project]. They didn't need a lot of improvement on [the Coconino NF project] because it was such a well-designed project, but they took that improvement and moved it to other project areas, like 4FRI. So, yes.

Some respondents suggested that the project is a success because it is a departure from the way the Forest Service used to work towards something more restoration driven, science-informed, and collaborative in nature. One respondent noted for this type of change to occur trust is the key factor.

#### ***EFFECTS OF RELATIONSHIPS ON THE SCOPE AND SCALE OF THE PROJECT***

The capacity of the contractor constrained the scale of the project since it was their first project. At the same time the scale increased by working closely with an adjacent landowner increased the scale. While the scale was somewhat influenced by non-agency stakeholders, but the complexity of project “*dramatically increased*” due to non-agency involvement, fire was returned as a restoration tool, restoration of aspen was include, as was the creating of downed woody debris, and other diverse activities.



## **Apache-Sitgreaves Project. Arizona.**

### **PROJECT OVERVIEW**

This is a large stewardship contract included as one of the last task-orders implemented under the White Mountain Stewardship Contract, the first 10-year large-scale stewardship contracting project ever implemented. The landscape has had a collaborative group in place since the mid-1990s as an outgrowth of a process that started in 1993. This project is mostly focused on wildfire risk reduction and restoration of resilient ponderosa pine forests. The project is a fairly straight forward reduction of tree density across a large area from a density of about 300 – 500 trees per acre down to 15 – 50 trees per acre.

### **INVOLVEMENT OF NON-AGENCY STAKEHOLDERS**

Respondents suggest that the most important consideration when working with non-agency stakeholders is to involve them early on in project development. The planning phase is again recognized as the most important phase of this project. A Forest Service respondent described how this early engagement works:

We're already talking to them about, we have an idea. We haven't even done anything....and that general area map may change half a dozen times before we actually get down to even measuring items within the... Now I'm talking about measuring, I'm talking about burn surveys, archeological, anything. So they're brought in early on, they pretty much know what we know. And I guess maybe that's evolving, is that there's nothing we're doing that's worthy of keeping from the public's eye. There's no secret here, it's the usual. So we meet once a month and as we're working through.

Non-agency participants contributed to the work of the ID team for the NEPA analysis and also in monitoring. Agency respondents suggest that non-agency participants did impact their decision making but clarified, *“It’s not like we make great changes because of public influence,”* and *“It’s more buy-in on what we are doing.”*

### **RELATIONSHIPS OF AGENCY AND NON-AGENCY STAKEHOLDERS**

The collaborative process began in 1993 and led to a memorandum of understanding between all of the partners involved in the restoration of this forest type in this region. This group is referred to as the Natural Resources Working Group which one respondent describes as bringing together people of divergent perspectives and expectations. Due to the long-standing nature of these relationships, respondents explained that their relationships with each other were well-established prior to the project and this did not change as a result of the project. Communication and follow through are identified as the foundations for trust. Challenges for effective agency-to-non-agency relationships were identified as the practical difficulty of involving all the ideas that come up and how to temper those which are not feasible without damaging relationships. The largest challenge identified is the slow pace at which work on the National Forests progresses.

Forest Service representatives suggest that the most challenging aspect of engaging non-agency stakeholders is that the members of the collaborative are aging and it is not clear who is going to

replace them. This is a very established group that has moved projects forward. There are not many new voices coming to the table.

### ***EFFECTS OF RELATIONSHIPS ON THE SCOPE AND SCALE OF THE PROJECT***

A Forest Service respondent described how the scale of projects and NEPA analyses have changed in this region within the last decade:

The [Apache-Sitgreaves NF project] was, as far as I can remember, the largest project or area we had done...and it's not just this one, but it's this other same kinda groups meeting with the Forest Service. At the forefront, they just completed a nearly 600,000-acre NEPA, and it's the same thing. Now, if that's not this group here, it's a different group on the other side of the state, but to go to a NEPA that size was unthinkable, even five years ago. And so here goes that, we're working on two local ones. The one is, on our side of the state it's 66,000 acres, but it's tied directly to the Gila National Forest in New Mexico, and with their acres added in, we're up to 200,000 acres of the NEPA here. Now, we ourselves, by ourselves, are planning another NEPA area that's 130,000 acres. I would suggest most forests in the nation are probably dealing with 30,000-acre NEPAs and I'm proud of that.

Respondents attribute a lot of this increase in scale to collaborative work that has occurred since the mid-to late-1990s. Some of the dramatic increase in the scale of project planning and environmental analysis is due to the fact that prescriptions for lower elevation ponderosa pine forests are somewhat generic and non-controversial, which has enabled a sizable scale up. Project participants believe prescriptions have gotten more complex.

## Cibola Project. New Mexico.

### **PROJECT OVERVIEW**

Following a NEPA process that began in 2009, implementation for this project began in summer 2014. The project is on 810 acres, but there are plans to expand it to more than 10,000 acres. The project is promoting forest health and reducing wildfire hazard in Pinion-Juniper and Ponderosa Pine forest types in the Manzano Mountains east of Albuquerque, New Mexico. It is one of USDA's Joint Chief's (NRCS and Forest Service) Initiative landscapes, meaning that additional funding is coming from other sources. The project area is also a high priority for The Nature Conservancy's Rio Grande Water Fund, which will allow for further additional funding from this payment for watershed services program to be included in the agreement.

The project has a robust collaborative group behind it, originating in a multi-stakeholder developed Community Wildfire Protection Plan from 2006 that lays out the planning process, community context, history of the area, a fire hazard assessment, and desired implementation activities, some of which are now being implemented through the stewardship agreement (i.e. prescribed fire, mechanical thinning, fire and thinning combined, monitoring/evaluation). The agreement is with the New Mexico Forest Industry Association. One agency interviewee described this non-traditional agreement holder making the project a *“proof of concept type of project to see how the forest industry association can function as a partner, a fair, transparent entity, putting out bids and getting logging contractors.”*

### **INVOLVEMENT OF NON-AGENCY STAKEHOLDERS**

Agency personnel interviewed identified the following non-agency stakeholders involved in the project and their associated roles in the project:

- Calunsh Pinto Soil and Water Conservation District: a major partner; scoping, project planning, implementation, NEPA, monitoring
- Eastcon, Edgewood, and Iugas Soil and Water Conservation Districts: scoping and project planning
- The Nature Conservancy: funding via the Rio Grande water fund, scoping, and project planning
- New Mexico Forest Industry Association: agreement holder (has had an agreement with NM, a master agreement for three years.), scoping, project planning, implementation, NEPA, monitoring
- Chililli Land Grant Association: scoping, project planning, implementation, NEPA, monitoring
- Retired foresters: certified by the USFS to do NEPA work (cruising) under contract with NMFIA
- Pueblo Isleta: scoping, project planning, implementation, NEPA, monitoring; partner on implementation
- New Mexico State Forestry Division: mentioned briefly in interviews, role not defined
- Homeowners associations: mentioned briefly in interviews, role not defined

Among non-agency stakeholders, the New Mexico Forest Industry Association wanted to see a *“smoothing out”* of contract offerings and larger projects. The role of the Industry Association is as project manager and agreement holder. As such they put out the work of the agreement for competitive bids, handle administrative paperwork for the contractors, operate as technical support, and write task orders, RFPs, contracts, etc.

### **RELATIONSHIPS OF AGENCY AND NON-AGENCY STAKEHOLDERS**

When asked whether the relationships between the agency and non-agency stakeholders had changed as a result of the project, agency interviewees suggested that already positive relationships had grown and evolved with partners now seeing and understanding the benefits of working together on the project. When asked whether the relationships between the agency and non-agency stakeholders had changed as a result of the project a representative from The Nature Conservancy said that the relationships are strong and that the forest supervisor had gone out of his way to remove barriers to progress.

Other non-agency interviewees recognized that agency personnel had come and gone and that it takes time to develop new relationships/working relationships, but that relationships are currently strong. Relationships between the agency and some non-agency stakeholders (e.g. a tribal group local to the project area) were described as “*working relationships*” that were historically not “*collaborative relationships*,” but that as a result of the project and related activities, relationships had bloomed into strong collaborative relationships beneficial to all stakeholders. For example, the local tribal workforce of Isleta Pueblo has become strong and active, benefiting all stakeholders wishing to see the project progress. An interviewee from Isleta Pueblo said, “*Before this collaboration on this project they [historical relationships between the tribe and the other partners] were virtually non-existent as far as working relationships, but now working on this project it’s brought everyone to the table and now everyone relies on working with each other to get the project done.*”

### **EFFECTS OF RELATIONSHIPS ON THE SCOPE AND SCALE OF THE PROJECT**

When asked about the scale changing as a result of non-agency participation, an agency employee cited the opportunity to bring more money into the project (e.g. Rio Grande Water Fund) and an already functioning collaborative process as being key to their ability to scale the project up. Non-agency interviewees also suggested that the project had been able to be expanded as a result of the collaborative process (i.e. the ability to include more people and address their issues). Other reasons why the project was able to scale up as identified by non-agency stakeholders include that agency personnel are especially focused on getting the NEPA completed and that the agency lead recognized the momentum and foundation that the collaborative group built, and he made working with this group a priority.

Along these lines, in their own words, the agency leader suggested:

So when I got here 6.5 years ago and saw the momentum and foundation those groups had built, really to be honest with you, the missing part was activity on the National Forest. There was a lot of activity and initiative on private and state land. When I got here our priority was to start to become more active with those partnerships, become a bigger player with landscape scale restoration with cross jurisdictional emphasis, trying to tag on to all the great work they have done already and become a more active partner at the table with those groups.

So obviously we started going down that road we had to first build a reservoir of NEPA-approved opportunity so even those we looked at these mountains as a landscape scale project, for financial management and the ability to start treating and building capacity we

broke the landscape into smaller sub projects so that we could work with NEPA approved in a certain location while working on outward year NEPA simultaneously and you know heritage surveys and biological surveys, etc. So we looked at it as a landscape but took a staggered project approach to it. That's what led us to today.

## **Santa Fe Project. New Mexico.**

### **PROJECT OVERVIEW**

This is a 10-year Indefinite Delivery Indefinite Quantity Integrated Resource Service Contract (IDIQ IRSC) focused on thinning tens of thousands of acres and reintegrating fire into a 100,000 acre landscape. The idea for this project was driven forward by the Forest, a national conservation organization, and another federal land management unit adjacent to the Forest. These partners were spurred on by trends in declining forest health and resilience and several large high-severity stand-replacing wildfires that have occurred within the southwest U.S. over the last decade. Overall, opinions are mixed on whether or not the project is viewed as a success.

The main objective is to restore the fire regime in the predominantly ponderosa pine forest. Related objectives include watershed improvements, fish habitat enhancements, restoring aspen stands, and decommissioning more than 100 miles of roads. One participant described the objectives succinctly as, *“To make the forest and watershed more resilient to wildfire, drought, and climate change.”* The long-term IDIQ IRSC structure was intended in part to help stimulate new investment in small diameter log utilization, which has been all but non-existent in the area.

### **INVOLVEMENT OF NON-AGENCY STAKEHOLDERS**

As part of a CFLR project a large collaborative group having over 20 entities represented is driving this project forward. Membership includes national and regional conservation organizations, a tribal nation, federal land management agencies, federal scientific agencies, state natural resource agencies, the forest industry, environmental groups, and academia. Each group came with their individual interests, expectations, and expertise—road decommissioning, fish habitat enhancements, returning fire to the landscape, economic opportunities, and more. The main phases of this project that this group has been involved in include scoping, planning, implementation, and monitoring. Monitoring of ecological and socioeconomic attributes is a large component, as collaborators seek to institutionalize adaptive forest management within this landscape.

Planning for the stewardship contract coincided with the start of the 10-year CFLR project, a significant portion of which needed to go through a NEPA analysis covering a very large area. This analysis took four years to complete and much of the collaborative engagement in this stewardship project concerned the pre-NEPA project framing and NEPA scoping. Other areas of non-agency engagement include implementation activities and monitoring, the latter two of which have more recently become a primary focus of many non-agency stakeholders. Due to the diversity and depth of involvement, a number of non-agency stakeholders also bring significant funding and in-kind resources to help implement and monitor the project.

When asked whether the involvement of non-agency stakeholders resulted in improved decision making about the project one non-agency participant remarked, *“well, I think, maybe if there was a different interpretation of FACA, the Collaborative, and NEPA, the Collaborative could have maybe helped design a project that was accomplished faster....and, with less heartburn by everyone....And I understand the delicate balance that line officers have to make, that they're not in violation of FACA, but I think that several things could've been done different.”* This same person told of their experience working with another federal agency through

NEPA on another federal ownership adjacent to the National Forest project. The goal was to accomplish NEPA simultaneously to facilitate seamless cross boundary implementation, but the Forest Service's NEPA took longer.

#### **RELATIONSHIPS OF AGENCY AND NON-AGENCY STAKEHOLDERS**

Over the course of this project, changes in local agency leadership affected relationships with non-agency stakeholders. A non-agency participant explained:

So the proposal period was very well facilitated, and they gathered lots of input, and there was a week of meetings, they were largely consensus-building meetings. And that was really good. There was a change of leadership right when the project was awarded at Sante Fe National Forest, and the project changed a little bit. The previous leadership, I think, wanted to be more of a meet at the table kind of member, then when that change of leadership happened, the new leadership, which is now, and that new leadership is ending, but the new leadership, I think, wanted to be leading the project more, and have Collaborative along for the ride, is my observation.

The trust and working relationships that had been built up over several years had to be rebuilt with a new individual. While the new line officer expresses a willingness to collaborate and an understanding of how to do so, the fact that new trust relationships had to be established appears to have impacted working relationships. Everyone interviewed for this project acknowledges this, even the agency person in question. Non-agency participants are now on the cusp of needing to build relationships with a third agency lead as the Forest Service is about to go through another staffing transition.

Not only are relationships impacted, but these transitions affected the workflow from planning to implementation. For instance, after the NEPA was approved the first task order was not the sort of activity that most non-agency stakeholders identified as a top priority through collaborative discussions with the previous line officer.

#### **EFFECTS OF RELATIONSHIPS ON THE SCOPE AND SCALE OF THE PROJECT**

This project was driven to be a very large cross-boundary project in part because non-agency stakeholders wanted it this way. External partners came together for the CFLR proposal and this has carried through NEPA on to implementation. *"I think when you involve all of these people you have to go large-scale. I mean if you go small scale some of these people are going to drop out.... [non-agency engagement] definitely influences the complexity because everyone comes with their different focus and this ended up being a complex and large-scale EIS because of that,"* said an Agency participant. Non-agency participants explained that their participation expanded the project to include meadows, soil erosion, and road decommissioning.

## **Dixie Project. Utah.**

### **PROJECT OVERVIEW**

This project is a stewardship agreement on more than 1,000 acres with a wildlife conservation organization. Other stakeholders include a watershed restoration program helping to fund the project. Project objectives include forest health and regeneration in aspen, ponderosa pine, and mixed conifer forest, and also reducing surface and ladder fuels. Overall, the project is largely viewed as a success by agency and non-agency respondents.

### **INVOLVEMENT OF NON-AGENCY STAKEHOLDERS**

This project does not have an extensive collaborative process associated with it. Rather, individual entities have defined roles and reasons for coming together to leverage resources. County Commissioners supported the project and commented on NEPA, which *“helped with public perception.”* The watershed restoration program evaluated the project for funding relative to other priorities and provided funding and organized field tours of the project area that attracted a lot of interest regionally. A Forest Service staff member explained, *“They put a panel together. The panel annually reviews proposals submitted by the various partners. The panel votes and ranks those proposals and funds those ones that score the highest.”*

The wildlife conservation organization that holds the agreement was involved in developing silvicultural prescriptions, mechanisms for fencing aspen, project implementation, and monitoring. The agency acknowledges that, *“they came up with some cost-efficient approaches to keep the costs down, but to get the work done.”* The agreement holder was interested in this area because it is a priority area nationally for the game species they work to conserve.

### **RELATIONSHIPS OF AGENCY AND NON-AGENCY STAKEHOLDERS**

The Forest Service is but one entity participating in the watershed restoration funding pool, so in some respects other entities participating in this funding pool help decide how federal and state resources are to be prioritized in projects. The agency person expressed sincere appreciation for the perspective, expertise, and resources their non-agency partners brought into the project, suggesting that these groups made the implementation tasks and implementation strategies more cost-effective.

### **EFFECTS OF RELATIONSHIPS ON THE SCOPE AND SCALE OF THE PROJECT**

Agency personnel do not feel that the project scope or scale was affected by non-agency involvement. However, a non-agency respondent felt the project became more complex and grew in size due to non-agency engagement because the watershed restoration initiative brought resources and priorities into the project that might not have otherwise occurred.



## SOUTHEAST REGION

### **Sumter Project. South Carolina.**

#### **PROJECT OVERVIEW**

This is a small IRTC focused on harvesting a Loblolly pine plantation and using the receipts retained to restore hardwood forests by reducing competition with non-native species. The project has been ongoing for four years. An additional objective has been to try and reintroduce American Chestnut into some of the project areas, which is being evaluated by the Forest Service Southern Research Station in partnership with a non-profit interested in restoring Chestnut.

#### **INVOLVEMENT OF NON-AGENCY STAKEHOLDERS**

The two primary non-agency stakeholders included timber purchasers and service contractors (tree planting and herbicide work). Secondary stakeholders included two non-profit conservation groups. The agency respondent mentioned a state agency as providing cost-sharing, labor, and equipment.

Forest Service respondents suggest the most important stage of involvement for individuals outside the agency is helping craft proposed activities, to complete implementation, and *“on the back end is helping with monitoring, the Forest Service struggles in its budget, you know having enough of a budget to do adequate monitoring. Having these folks help this out with any cost-sharing or labor is a real help.”*

#### **RELATIONSHIPS OF AGENCY AND NON-AGENCY STAKEHOLDERS**

Most of the relationships are one-on-one communications or communications through the NEPA process. The Forest Service respondent suggests that the involvement of a national conservation group helped with decision making by augmenting technical understanding to make the project more *“ecologically sound.”* The agency also suggested of the timber purchasers, that:

Where they come into play is kind of a reality check for us on how practical are the activities that we’re proposing, can someone come in and do this in an economical way, or is it something that will be just so cost prohibitive that no one’s going to touch it? They’ve been real helpful with helping us package the project in such a way that still meets our land management objective but it is also economical.

The non-profit group working to restore Chestnut has worked with the Southern Research Station and the field to consider reintroducing American Chestnut in the projects restoration activities. Their involvement has been helpful in directing the agency to not plant the species at this time. Regarding non-agency involvement, a Forest Service respondent said, *“it can be greater, and it’s no fault of theirs. We haven’t reached out enough yet I don’t think and that’s because, as short-handed as we are we are kind of just putting out whatever fire [metaphorical] is the biggest.”*

When asked whether relationships changed as a result of non-agency participation in stewardship contracting projects, the Forest Service respondent offered:

Yes I do...when I first got here in 2011, I transferred from out West, we had done on this District what I will call mainly conventional or traditional types of timber sales to implement project objectives where it wasn't stewardship and at that time the purchasers we like, 'OK here is my contract, I go in, I cut, and I pay you,' that kind of a thing. Now they are a lot more, also on the service contracts as well, they are paying a lot more attention on what we're trying to do from a silviculture standpoint, and ecological standpoint, we're getting more buy in from them on you know wanting to see the project succeed, because you know they will come to us and say, well, you know 'we aren't sure this is going to work, but how about like this, in terms of you are trying to do,' and they are paying attention more to the big picture of what we are trying to do.

This speaks to the "end-results" focus of stewardship contracting. In terms of the relationship with the national non-profit conservation organization, the agency respondent suggests, "*just having a relationship there and some regular communication because in the past, at least here on this District, it was really just doing the Forest Service thing and we weren't really connected with [the conservation group].*"

Overall, the quality of relationships is dependent on having all participants (agency and non-agency) more engaged in projects. On the economic side, the agency respondent thinks it helps smaller contractors to offer timber through stewardship contracts as opposed to timber sale contracts, presumably because of competition issues.

#### ***EFFECTS OF RELATIONSHIPS ON THE SCOPE AND SCALE OF THE PROJECT***

For this project the size and complexity was not impacted by non-agency stakeholder involvement.

## Florida Project. Florida.

### **PROJECT OVERVIEW**

According to the Forest Service the objective of this large stewardship agreement to “*increase the health of the Longleaf Pine ecosystem and to accelerate restoration,*” within a multi-ownership landscape. The agreement holder described their objectives as:

We were interested in the project because, actually we are supporting the Forest Service in accelerating restoration at all of our National Forests and that's what this project does. It accelerates the rate of, removal of slash pine plantations and then in turn restoration to Longleaf Pine woodland that has historically occurred on site. So, we're very supportive of assisting the Forest Service in any way possible to accelerate the progression towards those ecosystem restoration goals.

Activities include removal of Slash Pine plantations and restore Longleaf stands.

### **INVOLVEMENT OF NON-AGENCY STAKEHOLDERS**

The agreement holder is a national wildlife conservation group which has established a master agreement with Region 8. The project involves numerous regional and national non-profit wildlife conservation and environmental advocacy groups, local, state, and other Federal.

Most non-agency involvement came through an ongoing collaborative process of agencies and groups focused on restoring habitats within the Southeast Georgia and Northeast Florida landscape. This group focused on prioritization of projects, implementation, and leveraging financial and technical resources. The agreement holder brought their technical expertise and financial resources to bear, and enlisted the services of a well-known and experienced subcontractor to work with the Region and the Forest on the agreement.

The agreement holder's experience and expertise is recognized by the Forest Service as critical to making the project happen, as is the backing of the larger regional landscape-level collaborative. The agreement holder also recognizes that, “*we have some flexibility that the Forest Service just doesn't have.*”

An innovative part of this project involves using a local Job Corp program to train a restoration workforce in prescribed fire techniques. A respondent from a Job Corp program involved emphasized the social objectives of the project:

I think the objectives of the project was to give opportunity to young men and women who may not have had much knowledge or maybe did not know of the opportunity with the Forestry Department, [a national conservation group]. And it was utilized to recruit, I would say, minorities and women to give them an opportunity of employment in the Forestry Department. I think the objective for the Forestry Department was two-fold. I believe that was their initial objective. I think, personally, was to actually assess if these young men and women could do the job, and perform to their standards. And I was just gotten feedback from the employees of Forestry Department, these young men and women exceeded their expectation.

### **RELATIONSHIPS OF AGENCY AND NON-AGENCY STAKEHOLDERS**

The Forest Service is a consistent participant in the regional collaborative focused on longleaf pine restoration. Through this the agency has developed consistent and extensive personal relationships with non-agency stakeholders. Communications thus take place as part of formal networks and meetings and, informally, as person-to-person communications. Several non-agency respondents spoke very highly of the Forest Service in these interviews.

### **EFFECTS OF RELATIONSHIPS ON THE SCOPE AND SCALE OF THE PROJECT**

This is a highly integrated project with at least 12 different service items and over \$2 million in receipts and goods for services activities that are largely defined through collaborative work. A Forest Service respondent felt that the structure of the stewardship agreement and the flexibility of stewardship authorities will likely lead to its success, saying:

Having the forest product value of about over two million and you're gonna do \$2 million worth of stewardship service items, like, reforest... A lot of what's going to be done is conversion of existing industrial forests to Longleaf Pine restoration. If you plant 1,900 acres just the Longleaf Pine, that's quite an impact. The success of stewardship agreements is, it can reduce the burden or we don't even have to request appropriations, you don't have to do that kind of work. So, that's where I see the benefit of stewardship contracting agreements. You can accomplish a lot on the landscape with forest product value without getting supplemental appropriation dollars.

The agreement holder believes that the involvement of non-agency stakeholders increased the pace and scale of restoration in this region. Specifically, they suggest:

We are seeing a raise of longleaf and prescribed restoration and the return of prescribed fire to the landscape that is much more rapid than we have seen before, and that's in line with our Longleaf Pine goals for the region. So, the increase rate of restoration is one of our primary goals. And the other thing that we're very happy to see is... It's an important value for the agreement holder. It's an important value and goal for the Forest Service to do a better job of engaging in a meaningful way underserved communities that live in and around National Forests. So, the shared goal [the agreement holder] and the Forest Service have is that we both struggle to do an adequate job of... And I think what we found in this project through our partnership with Job Corp is, yeah we found a really neat way to do that, but do it in a way that's not outside of our general scope of work. We found a way to create a meaningful engagement that also gets the restoration down on the ground. And that's a really unique sort of win-win for both of us.

Moreover, the agreement holder reports that they are in the process of replicating the approach taken in this project area into other parts of the southeastern US.

## **George Washington Project. Virginia.**

### **PROJECT OVERVIEW**

This is a small agreement that was proposed and signed in 2009 or 2010. A national wildlife conservation organization is the agreement holder but other non-profit wildlife management organizations with less funding capacity had pushed for the project as much as a decade prior. Project objectives include timber harvesting to create early successional habitats for ground nesting birds, other habitat improvements management of pine savannah habitats, thinning for habitat, controlled burns, tree plantings, riparian plantings, wetlands and hydrologic restoration, and invasive vegetation management. A non-agency respondent described the habitat work:

The wildlife habitat work was a pretty broad spectrum. One aspect of it was the restoration of a savanna; another aspect was the addition of wetland-tolerant shrubs to the wetland hydrology restoration, and I don't think I mentioned it, but the inclusion of some desirable shrubs and small trees in the cutover areas for ruffed grouse, to benefit ruffed grouse particularly. Although deer and other species will certainly get their fair share of benefit out of it too, plus lord knows how many fruit-eating birds.

### **INVOLVEMENT OF NON-AGENCY STAKEHOLDERS**

In this project it was the non-agency participants who brought the project idea forward to the agency as they saw great restoration potential in the site. The central entity was a regional wildlife conservation group which was responsible for bringing the parties together. Other partners included state agencies and two national wildlife conservation groups, one of which was involved early on and one that came in later but brought more resources to the project.

According to a non-agency respondent, non-agency participants were involved to “provide a separate set of eyes” and “a different way of thinking.” These non-agency participants came up with the project ideas and participate in scoping, planning, implementation, and monitoring. Most of the entities involved provided their technical expertise of funding to complete the diversity of habitat improvements.

### **RELATIONSHIPS OF AGENCY AND NON-AGENCY STAKEHOLDERS**

Non-agency participants advanced the project. A state agency pushed the Forest Service to be accountable to the timelines and activities envisioned. “*The project takes pushing. It pushes the Forest Service out of their box a little we tried to push them on and at times held their feet to the fire in terms of deadlines and getting some things done....We are getting some things done that would have taken them longer or been non-existent.*” (State agency representative)

“*On this particular project, I would say yes in that in this particular instance, relations might be a little more strained. As I said, there's a little bit of frustration on our part that more isn't getting done quicker,*” said one of the non-agency stakeholders because of the pace at which the Forest Service worked. Overall, respondents feel that the project resulted in improved communications between the Forest Service and the various non-agency stakeholders and this led to strengthened relationships. The only negative thing reported is that the project took a very long time to develop.

### ***EFFECTS OF RELATIONSHIPS ON THE SCOPE AND SCALE OF THE PROJECT***

The involvement of non-agency stakeholders is believed to have increased the scale and complexity of this project. According to the Forest Service representative, it was one of the non-agency groups that “developed the heart of the project,” with others broadening the scope. The agency expressed that they “wouldn’t be doing anything” if it wasn’t for the proposal being brought to them and that as more groups came to the table the project got bigger. Non-agency participants agreed with this sentiment suggesting they made the project larger and an integrated set of activities.

## **Chattahoochee Project. Georgia.**

### **PROJECT OVERVIEW**

This project has been ongoing for more than five years and was considered for stewardship contracting prior to the NEPA analysis being conducted. The objectives of this project are to restore open-canopy forest habitats, reduce risks of Pine Beetle infestation, and combat non-native invasive species. Overall, the project is largely viewed as a success by agency and non-agency respondents.

### **INVOLVEMENT OF NON-AGENCY STAKEHOLDERS**

Primary non-agency stakeholders in this project include a university, two national conservation organizations, a rare plant conservation organization, and a state agency. Involvement of these individuals occurred during early conceptual planning, NEPA scoping, implementation, and monitoring. The collaborators were mainly focused on scientific analysis and monitoring associated with sensitive plant species, and for applying vegetation management practices in a way that facilitates restoration of early seral habitats and helps to ensure the continued existence of rare plants. A common interest in these objectives brought people together. From the agency perspective, non-agency participants focused on *“providing the technical support and also the best available science as far as the rationale that was needed to make the decision, the NEPA decision.”*

### **RELATIONSHIPS OF AGENCY AND NON-AGENCY STAKEHOLDERS**

A non-agency stakeholder explained that the project *“deepened and enhanced our relationship and communication [with the Forest Service] and our successes.”* When asked what contributes to the quality of relationships, a representative of the Forest Service said:

So I think what contributes the greatest is just full engagement, I guess, from the top down, of being responsive to one another. Not just us being responsive to them, but them being responsive to us....Accomplishing things on a smaller scale and showing results annually, year in and year out, encourages everybody involved to stay engaged and see the project through to completion.

Positive views on these interactions were also held by non-agency participants who were effusive in their praise of their agency counterparts at the National Forest.

### **EFFECTS OF RELATIONSHIPS ON THE SCOPE AND SCALE OF THE PROJECT**

When asked how non-agency stakeholder engagement impacted the scale and scope of the project, the Forest Service lead for the project said, *“I would say it probably definitely influenced the scope. We probably ended up including activities that we didn't consider. We probably considered additional areas across the landscape that probably weren't initially considered. I'm almost certain of that.”* Non-agency participants echoed this sentiment.

## **Davy Crockett Project. Texas.**

### ***PROJECT OVERVIEW***

This is a large Integrated Resource Timber Contract (IRTC) that has been ongoing for nearly a decade since the idea was first conceived. Project objectives include longleaf pine ecosystem restoration, road restoration, and stabilization of a dam. The primary non-agency stakeholder is the local Resource Advisory Committee (RAC). Overall, the project is largely viewed as a success by agency and non-agency respondents.

### ***INVOLVEMENT OF NON-AGENCY STAKEHOLDERS***

Non-agency participation occurred in this project through the local RAC which reviewed the initial project concept and made recommendations as it would with other project types. One organization sitting on the RAC relayed that their recommendations to maintain conservation values by modifying proposed harvest units were incorporated into the final project design. Project participants report that the RAC affords a structured relationship for the Forest Service to work with non-agency stakeholders, and agency respondents appear to be comfortable with this approach, suggesting that it is improving the projects put forth.

### ***RELATIONSHIPS OF AGENCY AND NON-AGENCY STAKEHOLDERS***

One non-agency participant from a conservation organization noted that previously on the Forest there was considerable controversy over forest management, but that:

Once that public collaboration became a primary objective with the Forest Service....it became a vehicle to resolve conflict. So we saw a huge step forward with the initiation of public collaboration and it was a commitment by the Forest Service that they were not only willing to listen to the public but they were willing to compromise and to incorporate other values.

For the agency, this type of steady and predictable entity has proven to be an important partner which has built trust. Disagreement over project scope has a place and a process for resolution.

### ***EFFECTS OF RELATIONSHIPS ON THE SCOPE AND SCALE OF THE PROJECT***

The size of the project was not affected by non-agency engagement but some of the prescriptions were changed in order to accommodate stakeholder values (e.g. not harvesting stands with unique wildlife habitat values).



## Talladega Project. Alabama.

### **PROJECT OVERVIEW**

This is a stewardship agreement with a regional conservation organization, that while fairly new to stewardship contracting as a group, has people on staff who have deeply engaged in stewardship contracting throughout the Southeast over the last decade. Project objectives are to restore longleaf pine to advance the conservation and recovery of the red-cockaded woodpecker, a federally listed species under the Endangered Species Act. The project is using timber harvesting and prescribed burning to achieve these goals. Overall, the project is largely viewed as a success by agency and non-agency respondents.

### **INVOLVEMENT OF NON-AGENCY STAKEHOLDERS**

The regional conservation organization approached the Forest Service with the idea for the project because the area is especially important for species they value and that are aligned to their mission. Moreover the leader for this organization has been involved in at least 20 stewardship contracting projects and saw an opportunity on a district on the Forest to make a difference. This external group brought grant funding to the project to help facilitate project planning and a diversity of implementation actions. The agreement holder also works with the timber industry on timber thinning work and with another conservation organization to manage prescribed burns in the area.

### **RELATIONSHIPS OF AGENCY AND NON-AGENCY STAKEHOLDERS**

The position of the line officer changed during the lifespan of this project. The ranger who the agreement holder first approached about this project left and the replacement was less excited to work with external groups. This did not go unnoticed with a non-agency stakeholder who said:

If the people on the district don't want to do it, it is time to say thank you very much and go somewhere else. You can't fight it. What you have to do on that district is you have to wait for someone to leave. It has gotten better, a lot better, orders of magnitude better on a national scale but it is because people have had a good opinion of stewardship and then they get transferred elsewhere and they start doing it elsewhere and bring that good experience with them.

This respondent recalled their experiences working with Forest Service staff who really wanted to work with external groups, and others who did not. Based on their experience their recommendation for working with the agency is to not try and force a relationship if it is not there. They advised that if the individuals within the agency are not going to rise to the occasion it is not worth a stakeholder's time to try and make it work.

In this project, a Forest Service respondent identified that a tangible opportunity for them was accessing skilled workers to complete restoration actions. *"One of the biggest reasons why we do stewardship is the manpower issue. So we can bring in partner resources,"* said a Forest Service respondent. Through this and other projects, non-agency stakeholders bring trained natural resource workers.

For their part, a Forest Service respondent suggested:

We've had to establish a level of trust to have the open level of communication that we can work through the issues. Since we do have similar goals but have slightly different ways of getting there sometimes, we have to be able to have an honest dialogue throughout the process.

The agency staff also speculated that on their Forest and largely throughout the southern region there are few partners who are aligned with the agency's mission and can carry the message forward with external groups. The agreement holder also highlighted that they offer this unique opportunity to the Forest Service saying:

I think it helped the Forest Service that there was someone other than the Forest Service involved. The community down there in Alabama is a pretty timber-friendly community, you don't have a lot of lawsuits but it never hurts to have a partner who is a non-profit who is not the Forest Service supporting a project like this.

***EFFECTS OF RELATIONSHIPS ON THE SCOPE AND SCALE OF THE PROJECT***

The involvement of non-agency stakeholders did not alter the scale but complexity was identified as increasing due to the agency requesting that the agreement holder put in additional botanical plots to monitor the effects of herbicide treatments and prescribed burning.

## **Francis Marion Project. South Carolina.**

### ***PROJECT OVERVIEW***

This project includes approximately 80 acres of mid-story vegetation treatments, 50 acres of non-native invasive species treatments, 75 acres of early successional habitat restoration and enhancement, and feral hog control. This is a small project with no clearly defined collaborative group but with several cooperators engaged.

### ***INVOLVEMENT OF NON-AGENCY STAKEHOLDERS***

Non-agency respondents report being engaged off and on since the inception of the project. The organizations identified as playing a role in the project and their corresponding roles include:

- Quail Unlimited: developing proposals, planning, providing labor to assist the Forest Service in managing habitat, limited monitoring
- South Carolina Department of Natural Resources: scoping, development of proposal, planning, limited monitoring.
- US Fish & Wildlife Service: development of proposal, planning
- South Carolina Native Plant Society: providing labor to assist the Forest Service in managing habitat

### ***RELATIONSHIPS OF AGENCY AND NON-AGENCY STAKEHOLDERS***

Relationships between the various stakeholders are described as being strong with overlapping interests.

### ***EFFECTS OF RELATIONSHIPS ON THE SCOPE AND SCALE OF THE PROJECT***

Those interviewed identified no effects of relationships on the scope and scale of this project.

## **Ouachita Project. Arkansas.**

### **PROJECT OVERVIEW**

This Integrated Resource Timber Contract (IRTC) occurring on 2,500 acres of the Ouachita National Forest bundled the sale of merchantable timber on 1,769 acres with a variety of wildlife-focused activities. Service work included 730 acres of wildlife stand improvement and development of a two acre wildlife opening with a small wildlife pond. All net revenue will be collected as retained receipts to conduct prescribed burning on 9,326 acres in another project.

### **INVOLVEMENT OF NON-AGENCY STAKEHOLDERS**

Non-agency personnel included a contractor (West Fraser) and two subcontractors, BU Forestry & Landscaping and Ouachita Rock. West Fraser managed subcontracts for service work and completed the timber related activities. West Fraser reported that all subcontractors are local.

### **RELATIONSHIPS OF AGENCY AND NON-AGENCY STAKEHOLDERS**

Relationships with the agency were described as positive and did not change as a result of the project. West Fraser would like to see more timber put up for sale from the forest (consistent with the Forest Plan) than is currently happening. West Fraser also stated that the Forest Service told them that the shortfall of sales from the Plan is caused by a lack of boots on the ground due to budget shortfalls.

### **EFFECTS OF RELATIONSHIPS ON THE SCOPE AND SCALE OF THE PROJECT**

Respondents identified no effect of relationships on the scope and scale of the project. This was the first stewardship project attempted on the particular district and two additional projects have been accomplished since the project was initiated. The agency employee interviewed stated that, “[the project] *itself was pretty much geared towards timber, timber things. We did some wildlife habitat improvement with the mid-story and doing the pond, but it was just a straightforward, simple project to get us going.*”

## **Cherokee Project. Tennessee.**

### ***PROJECT OVERVIEW***

This project is the first stewardship agreement between the National Wild Turkey Federation and the Forest Service on the Cherokee National Forest. The project thinned 140 acres, resulting in open forest to improve wildlife habitat, and conducted prescribed burns.

### ***INVOLVEMENT OF NON-AGENCY STAKEHOLDERS***

The following non-agency stakeholders, and their associated roles, were identified as being involved in the project:

- National Wild Turkey Federation: project planning, implementation
- Tennessee Wildlife Resources Agency: scoping, NEPA, implementation
- Tennessee Exotic Pest and Plant Council: no clear role identified
- Tennessee Ornithological Society: no clear role identified
- Polk County: no clear role identified
- Partners of Cherokee: no clear role identified
- University of Tennessee: no clear role identified

### ***RELATIONSHIPS OF AGENCY AND NON-AGENCY STAKEHOLDERS***

Forest Service personnel report being encouraged by additional working relationships they developed with the Tennessee Wildlife Resources agency. The National Wild Turkey Federation reports that they were able to build upon existing relationships to make them stronger.

### ***EFFECTS OF RELATIONSHIPS ON THE SCOPE AND SCALE OF THE PROJECT***

Agency and non-agency interviewees differed with respect to whether they felt that non-agency stakeholder engagement in the project modified the scope or scale. Agency personnel felt that it had while non-agency personnel said no, it had not.

## NORTHEAST REGION

### **Huron-Manistee Project. Michigan.**

#### **PROJECT OVERVIEW**

This is an integrated timber resource contract (IRTC) that involves tree removal and watershed improvements by stabilizing erosion near a river and improving trail crossings over streams. The primary non-agency stakeholder is a motorized off road vehicle recreation club that has been working with the National Forests in the region for a very long time.

#### **INVOLVEMENT OF NON-AGENCY STAKEHOLDERS**

As the main non-agency project participant the motorized recreation organization represents both a user group and a source of skilled labor. This group provided volunteers who contributed to some activities related to the service side of this project, moving stone for streambank stabilization. Some of their membership also owns and operates heavy equipment which is a service they volunteer to the Forest Service in other projects.

#### **RELATIONSHIPS OF AGENCY AND NON-AGENCY STAKEHOLDERS**

The project is in a fairly remote area and agency turnover is high. *“It seems we’re always helping new people get up to date on what’s going on,”* said a non-agency participant. The recreation organization is a long-standing entity with members who know the area and its forests well. When new agency personnel arrive at the Forest, leadership from the recreation group meet with them to bring them up to speed with resource needs and the relationships between the agency and partners in the region.

Stewardship contracting has not taken off on this Forest and neither has collaborative engagement in project development. The agency lead for the project explained that, *“It would be nice to have some of them [non-agency stakeholders] coming in on these proposals or coming in to these meetings and having ideas and stuff that they maybe want us to do.... it's just the way that we've approached stewardship over the last few years and it's still trying to figure out how to make it work right.”*

On the contrary the motorized recreation group is commonly known to have potential detrimental effects on trails and water resources. They realize this and feel that a commitment to maintaining trails and natural resources *“keeps us on a pretty good side of them [the Forest Service] by doing what they need to have us do and working with them.”* As such there is a built-in incentive for this user group to seek out opportunities to work with the agency. They have labor and equipment to offer the Forest Service, too. As communicated by a representative for this organization:

Usually there is not a lot of money available to take care of these kinds of things so unless we help doing it it's not gonna get done. This volunteerism is so important to maintain these types of things, I don't think the federal government would have enough...or want to put enough effort in to maintain it. It would simply be too costly for them. So that's

the biggest thing we bring. That's what keeps this partnership surviving as it has for the last 50 years.

***EFFECTS OF RELATIONSHIPS ON THE SCOPE AND SCALE OF THE PROJECT***

Perspectives were split on whether non-agency engagement increased the size. The complexity was increased in that some implementation actions needed to be modified during the middle of the project.

## Ottawa Project. Michigan.

### **PROJECT OVERVIEW**

This stewardship contract was with the Lax Vieux Desert Band of Lake Superior Chippewa Indians. The project included two parts: (1) red pine thinning of approximately 15 acres, and (2) a watershed improvement project to mitigate existing resource damage. Goods-for-services (IRTC or IRSC) were used and the Tribe used the logs to construct a traditional roundhouse requiring 150 twenty-five foot logs. The Forest Service and the Tribe agreed to pursue the use of stewardship contracting as a short-term option to meet Tribal request for logs, with the understanding that this would not resolve Tribal treaty rights issues that existed between the two parties. There is no collaborative group present.

The Forest Service used stewardship contracting as a tool the Tribe had been wanting for a long time under their treaty rights. The treaties in the Lake States said that the use of products for traditional uses was acceptable but legal precedent specified that tribes could not harvest merchantable timber under their treaty rights, so the Forest Service could not find a way to legally allow the Tribe the use of round logs for long house logs. Stewardship contracting at that time was a fairly new tool and additionally it took a little bit longer and a bit more work for the Forest Service, they *“were able to supply them with a thing that was really a right of theirs and so using this tool was a compromise of sorts to allow them to get to have logs and so it just built relationships and we were able to work with them to get them something they really wanted.”*

### **INVOLVEMENT OF NON-AGENCY STAKEHOLDERS**

- The Great Lakes Indian Fish and Wildlife Commission: Primary drafter, negotiator, and facilitator of MOU between the Tribe and the Forest Service
- Tribe (Lac Vieux Desert): implementation
- Voight Tribal Task Force: consulted by Tribe

### **RELATIONSHIPS OF AGENCY AND NON-AGENCY STAKEHOLDERS**

Since this project there have not been others with the Tribe, although the Forest Service is working toward additional projects now. There is another tribe the agency is trying to work with, to less success. The agency employee interviewed felt that the project helped build trust between agency and the Lac Vieux Desert Tribe, citing that relationships have gotten more positive with the Tribe and that the agency goal was to help build local capacity with the Tribe and to start improving the agency-Tribal relationship.

### **EFFECTS OF RELATIONSHIPS ON THE SCOPE AND SCALE OF THE PROJECT**

The project scope and scale were not affected by agency to non-agency relationships and interactions.



## **Chippewa Project. Minnesota.**

Note that for this project no non-agency stakeholders were interviewed due to repeated lack of response to requests for interviews.

### ***PROJECT OVERVIEW***

This project includes a diversity of activities: repairing impoundments to fish passage, watershed improvements, improving forest health and diversity, and improving and decommissioning roads. The project was split up into several different activities and non-agency stakeholders were not involved in project planning or design in an integrated fashion.

Because of this, the agency respondent explained that non-agency stakeholders involved likely do not even know that it is a stewardship contract.

### ***INVOLVEMENT OF NON-AGENCY STAKEHOLDERS***

Non-agency stakeholders were not significantly engaged in development of this project. The District Ranger suggests that early collaboration with non-agency stakeholders is very important but that they “*don’t have a lot of participation in the community, so it is mostly internally driven.*” The line officer said:

I think we could have done better. There was really no collaboration externally with this proposal, it was, some of the collaboration was considered during the NEPA process, but you know to really meet the intention of stewardship contracting we ought to be collaborating with partners outside of that NEPA process. That didn’t happen with this one.

There are, however, new efforts on this ranger district to engage non-agency stakeholders. For instance the Forest Service is trying to build a relationship with a local tribal nation. The line officer reports participating in tribal council meetings by presenting proposed projects to seek their feedback and identify areas to work together, but this did not happen on this project.

### ***RELATIONSHIPS OF AGENCY AND NON-AGENCY STAKEHOLDERS***

Working relationships are described as non-collaborative. On this Forest the agency has historically used passive forms of public engagement to meet its needs, and agency participants acknowledge that this is not in keeping with the intention of collaboration under stewardship authorities. More recently the agency has increased active public engagement activities, like proactively meeting with stakeholders in an attempt to engage them in project planning.

### ***EFFECTS OF RELATIONSHIPS ON THE SCOPE AND SCALE OF THE PROJECT***

When asked whether the involvement of non-agency stakeholders has influenced the size or scope of this stewardship contracting project, the line officer again reaffirmed that this was not a collaborative project and that non-agency stakeholders did not influence the scope or scale.

## **Superior Project. Minnesota.**

### **PROJECT OVERVIEW**

This is a large Integrated Resource Timber Contract (IRTC) generating stewardship receipts to accomplish costly service work while providing improved habitat for moose and employment opportunities to local contractors.

### **INVOLVEMENT OF NON-AGENCY STAKEHOLDERS**

This project area is in a very rural area where forest industry is the predominant stakeholder. Most of their involvement in this project is focused on project planning and implementation. Planning is largely limited to casual conversations with Forest Service staff about the scope of projects, specifically the timber components, which matter significantly to the industry. Likewise, the Forest Service is motivated to package projects that accomplish multiple objectives and make the best use of their available resources, so designing projects that appeal to industry is important. As reported by the line officer, agency engagement has focused on: *“operators that do the work on the ground, rather than interest groups or other people that would care about the outcomes, or what people would be interested in during NEPA. So I think in this project we were... It was one of the first ones that we did and we weren't sure what collaboration meant exactly.”*

### **RELATIONSHIPS OF AGENCY AND NON-AGENCY STAKEHOLDERS**

The agency has a positive working relationship with industry. Annually the Forest invites the interested public to a planning session in which all of the proposed projects are discussed. This is an opportunity for industry to provide feedback to the agency that helps them design projects that meet mutual objectives, especially in areas like this project site that are of marginal timber value. Still the agency identified challenges in trying to engage external parties in these projects:

Most of the folks that I've invited in on talking about the projects, the preliminary stages, they seem very engaged, very positive, but it's like pulling teeth to get them to turn a proposal in or to bid on a contract. Some guys say it's because you have to write a proposal if you wanna get a contract, there's a few more motions than normal compared to a timber sale. But especially the older folks, I don't know, I think their computer savvy might hold them back on some of that.

### **EFFECTS OF RELATIONSHIPS ON THE SCOPE AND SCALE OF THE PROJECT**

Opinions were mixed on whether the size of the project changed due to non-agency participation but most either did not know or did not think non-agency involvement had affected the scale. As for scope, most respondents did think that the scope changed based on feedback from contractors during the planning stage.

## **Chequamegon-Nicolet Project. Wisconsin.**

### **PROJECT OVERVIEW**

The project is designed to be a straightforward demonstration of how a stewardship project could work given the local context. Objectives cited include helping get National Forest timber on the market, to increase age class diversity, improve wildlife habitat, recreation access, water quality, and to strengthen partnerships with local towns. When describing the project an agency representative said:

Locally, we've got a political movement to get more timber harvested out of the national forest, and to get more work done locally out on the forest. So, part of it is to produce volume for the local economy. Part of it is to trade the value of that to get work done across the Forest...Couple of the service items on this are to mark about...a 1,000 acres of timber.... And this would be getting additional timber volume treated and prepped, not using appropriated monies. So, in other words, that's allowing us to get a little bit more timber volume-prepared than we ordinarily would have....And there's quite a few service items, both inside of the timber sale area, and then in other places around the district that are getting done that probably ordinarily wouldn't get done.

### **INVOLVEMENT OF NON-AGENCY STAKEHOLDERS**

There has been a push by the forest industry in Wisconsin to make more National Forest timber available. A Forest Service respondent described this movement saying, *“There's a group....called Federal Forest Sustainability Committee and they're a group of local and regional people that are concerned about the level of harvest in National Forests. We were kinda in communication with them before and during the process, just responding to....some of the things that they've been coming to us with.”*

One of the strategies industry has been advancing is the use of stewardship contracting. In doing so, a state economic development agency provided a grant as match for a stewardship agreement. The goal of the state economic development agency is to *“create the capacity to do stewardship projects on the National Forest.”* The agreement holder is advised by an advisory group that *“is an industry-like group”* composed of individuals from the early involved wildlife conservation group, the state economic development agency, a county government forestry group, and the Federal Forest Sustainability Committee. The Forest Supervisor also participated in this group. A master stewardship agreement with the Regional Office was negotiated by the agreement holder, a regional economic development non-profit, and set about getting a project developed under this agreement.

In creating this project the Forest Service packaged a timber sale with some of the habitat work that the national conservation group involved early on had been advancing for quite some time. This group has a cooperative management area on the Forest and had worked on several projects across the Forest investing significant non-federal resources. This group had pushed for aspects of this project for a long-time with little support from the Forest Service and was dismayed when the Forest announced that there would be an agreement but not with them.

## **RELATIONSHIPS OF AGENCY AND NON-AGENCY STAKEHOLDERS**

The state economic development agency reports improved decision making about the project due to the fact that the project would not have happened without funding they provided and consider themselves involved in implementation because of this. The corporation suggests that the type of involvement that is the most important is promoting awareness of what stewardship contracting is and what it can do. This project was not so much about consensus building as it was interested stakeholders developing a strategy to advance objectives they cared about.

The state economic development agency reports that relationships between the agency and non-agency stakeholders grew from a point of non-existence to trust and mutual respect because the agency was not really engaged with this group prior to this project. Clear paths of communication (e.g. one-on-one relationships between individuals or a group) promote the building of such trusted relationships and commonality in objectives. Non-agency stakeholders suggested that the project timeline would shorten if the Forest Service could move more quickly in getting revenue from timber.

In this project the agency temporarily soured a relationship with a long-standing partner by choosing to pursue an agreement with a new partner. In this instance the agency respondent said of this long-standing partner who had provided significant cost-share across the Forest, *“they were supportive of the project but didn't offer a lot of perspective or additional information for us to consider in the decision making process....They got some of their membership to submit comments during the environmental analysis in general support of the project, however that did not change or improve the decision making process or the outcomes.”* This agency respondent went on to suggest that this long-standing partner *“could do more as an organization for as much as they talked to us. They could do more on the ground to help out with these types of projects, and just offer support and let the Forest Service largely figure out how to pay for the projects and all.”*

The agency respondent went on, revealing:

The timing of the implementation and their initial desire to participate in the implementation and our, as an agency, we were unable to say, I don't know, corral that enthusiasm and direct it. We weren't... We did not have the expertise nor the knowledge of how to fully begin these stewardship agreement relationships. And, in the long term or in the near term, we may have soured a willing partner.

While the agency initially had a willing partner, the Forest's lack of knowledge about stewardship agreements or willingness to move forward prevented this partnership from culminating in an agreement. Also, this existing partner was more interested in wildlife habitat than timber extraction. A newly created partner brought money to the table and a focus on economic development through timber harvesting. This aligned with agency goals to produce timber and with those of the Federal Forest Sustainability Committee which was linked to a push by Congress to produce more timber off the Chequamegon-Nicolet NF.

So now we have developed a working relationship with the [the new entity]. We're implementing this first agreement, and we are moving forward with another stewardship agreement with them on another project, they're continuing to express a desire to be a willing partner in the implementation of stewardship projects. So that's changed

significantly. (Forest Service representative)

***EFFECTS OF RELATIONSHIPS ON THE SCOPE AND SCALE OF THE PROJECT***

According to all respondents the project would not have happened without non-agency stakeholders pushing for it in order to address economic and ecological objectives.

## **Mark Twain Project. Missouri.**

### ***PROJECT OVERVIEW***

This small IRTC is focused on restoring a glade habitat by removing cedar trees encroaching on the area. The project was six years in development. The agency initially considered a larger project and then broke it into smaller projects to meet the needs of industry.

### ***INVOLVEMENT OF NON-AGENCY STAKEHOLDERS***

Primary non-agency stakeholders include sawmills in the area that use cedar trees. They helped mostly with planning and implementation, identifying ways to make the project economically viable. Secondary stakeholders two national conservation groups, and the Central Hardwoods Joint Venture which were active in the planning phase by providing input and recommendations.

An agency respondent remarked that this was the first time that they had worked with non-agency participants to actively plan project design, specifically the mix of timber and service work items to package the project in a way that would be attractive to mills. Regarding engagement of non-agency entities:

Well, we had meetings with the people before we actually... I think it was already planned, but we had meetings with our local... The timber people, cedar cutters and just to say, 'Hey, this is what we're planning to do. Is this something...Is this gonna work out? Is this something that you would maybe be willing to participate in?' So kind of like that. (Forest Service respondent)

### ***RELATIONSHIPS OF AGENCY AND NON-AGENCY STAKEHOLDERS***

This was the first time that the agency had actively engaged non-agency stakeholders in project design. Agency respondents expressed that communicating effectively up front about the details of the project and stewardship contracting authorities was a challenge, especially explaining all of the processes and rules of the Forest Service. The agency also expressed that the project resulted in a net gain for the Forest Service, that is "getting paid instead of paying" to get this type of work done.

### ***EFFECTS OF RELATIONSHIPS ON THE SCOPE AND SCALE OF THE PROJECT***

The involvement of the mills helped the agency right size the project, breaking up what was initially one larger project area into several smaller projects.

Oh since this was our first one, we really weren't sure how to put it together as far as do we wanna sell it all as one big block and we talked to them on, "What's a feasible amount that you can cut in this amount of time?" 'Cause we didn't want the project to go on forever, so we were able to think, okay, this many... About this many acres and for a block of that we put in together. So they helped us kind of... In our minds, we didn't wanna give somebody two or three blocks because we didn't want them to fail. And we didn't want our project to not be successful.

- Forest Service respondent

## **Finger Lakes Project. New York.**

### **PROJECT OVERVIEW**

This is a small agreement between a farmer and the Forest Service focused on maintaining grassland bird habitat. The project is a unique use of the goods for services authority that involves a farmer receiving access to mow a series of fields on the National Forest to trying to control woody and herbaceous plants. In exchange, the farmer keeps the hay for forage. The agreement and relationship is very simple. The project has existed for around 5 years.

### **INVOLVEMENT OF NON-AGENCY STAKEHOLDERS**

In this project, the agreement holder is the only non-agency participant. The farmer visits the district office regularly to check in. The farmer feels that he is able to tell the agency exactly what he thinks “without them getting annoyed.”

### **RELATIONSHIPS OF AGENCY AND NON-AGENCY STAKEHOLDERS**

Agency respondents and the agreement holder report having common values about promoting grassland nesting bird habitat through active management via mowing. The Forest Service respondent suggested:

I don't know before. That was prior to me getting here, but he's more involved. He comes to the office, he checks on things, asks questions about things, and we obviously chat in the springtime prior to where we do... We have grassland burn surveys that we require ourselves to do in these locations and all these grasslands prior to any kind of mechanical or chemical or any kind of treatment for that matter in the spring and summer months. So, just more general conversation between myself and the district ranger and [the farmer]....I think it's just the type of rapport that we have with them that builds the relationship, for sure. Just that rapport started on knowing the culture in the area and just being good members of the community before Forest Service season.

### **EFFECTS OF RELATIONSHIPS ON THE SCOPE AND SCALE OF THE PROJECT**

There has been no effect on the scope and scape of the project.

## **Allegheny Project. Pennsylvania.**

### ***PROJECT OVERVIEW***

This is a stewardship agreement between the Kane Area School District and the Allegheny National Forest salvaged timber on approximately 500 acres of the Allegheny National Forest that blew down during a 2003 storm. The project was intended to facilitate the reforestation of the area and to provide a biomass supply for the Kane Area High School and the Elk Regional Health Center (ERHC).

### ***INVOLVEMENT OF NON-AGENCY STAKEHOLDERS***

The following entities (and their roles) were identified as active non-agency stakeholders involved in the project:

- Kane School District: implementation, post-NEPA planning
- New Growth Resources: implementation. They harvested the material and supplied the school.
- Elk Regional Hospital: implementation (very minor role of purchasing biomass from Kane School District)

### ***RELATIONSHIPS OF AGENCY AND NON-AGENCY STAKEHOLDERS***

When asked how the project changed as a result of non-agency stakeholder involvement the School District suggested that the project led to new relationships and that the early success is leading towards new discussions about another agreement with the Forest Service. The agency reported that relationships have changed for the better.

### ***EFFECTS OF RELATIONSHIPS ON THE SCOPE AND SCALE OF THE PROJECT***

Respondents identified no effects of relationships on the scope and scale of the project; however, they are pursuing an additional agreement.



## **White Mountain Project. New Hampshire.**

### ***PROJECT OVERVIEW***

This Integrated Resource Timber Contract combines activities including maintenance and improvement of existing recreation facilities, wildlife habitat improvement, timber harvesting, timber stand improvement, and watershed improvement. Stakeholders had concerns about visual impacts of harvests, impacts to ski trails, and other issues. Project activities included: road decommissioning, facility improvements/construction, forest vegetation improvements, facility maintenance, trail management, road maintenance, travel management, and timber harvesting. The project does not have a collaborative group but rather interfaced with several individual interests.

### ***INVOLVEMENT OF NON-AGENCY STAKEHOLDERS***

Non-agency stakeholders, and their roles, as identified by interviewees include:

- Bretton Woods Ski Area: planning, implementation, monitoring, adjacent landowner
- Town of Carroll Conservation commission: planning, implementation
- Appalachian Mountain Club (AMC): scoping, project planning
- New Hampshire Department of Transportation: planning, implementation
- New Hampshire Fish and Game Department: project planning, NEPA
- US Fish & Wildlife Service: project planning and NEPA
- Ammonoosuc River Local Advisory Committee: planning

### ***RELATIONSHIPS OF AGENCY AND NON-AGENCY STAKEHOLDERS***

The AMC and Bretton Woods have existing long-term relationships with the Forest Service as special use permittees and adjacent landowners. These long-term relationships helped with communications about the project as it progressed. The AMC suggested that their organization is useful for helping the Forest Service communicate its stewardship message to the public. The AMC also expressed disappointment that a historical dam that was originally slated to be restored as part of the project was left off the list of work items due to the cost of restoring it. This disappointment was minor however and did not change their relationship with the Forest Service.

Agency personnel stated that overall communication has increased with Bretton Woods Ski Resort and the AMC and that the agency has developed a new relationship with the Ammonoosuc River Advisory Committee but that these increased communications have yet to generate additional projects.

### ***EFFECTS OF RELATIONSHIPS ON THE SCOPE AND SCALE OF THE PROJECT***

Interviewees report that minor changes in the scope of the project occurred as a result of agency to non-agency relationships. A representative of Bretton Woods reported that some of his apprehensions around visual impacts were mitigated by minor changes to the project. It was also identified that cooperating non-agency stakeholders liked the project as proposed but that some trail relocation work, money for a new bridge, and money for the dam were not available, so the scope of the project changed. The agency interviewee said that this stewardship project was possibly a bit more than the agency could manage in that it took more time and energy to prepare and required more coordination than others they had handled. As the project broadened, the agency respondent stated that the Forest Service has to be more sensitive to more interests, saying:

It didn't force the scale of the project, I think we took a little broader look a few more detailed type projects involved nested within the project, and I think that's what caused us to do, is on our projects that we've started to develop after the Crawford project we've been sensitive to the fact that sometimes the more folks that you have involved the more complicated a project can be. With that complication comes a little more time and energy that needs to be invested. So we've been very conscious about trying to keep the scale of projects manageable.