

**OSU College of Forestry
McDonald-Dunn Research Forest Faculty Planning Committee (FPC) Meeting #20
25 January 2024, 11:30am-1:30pm
301 Peavy Forest Science Center and Zoom**

Faculty Planning Committee Members present: Holly Ober (chair), John Bailey, Mark Kerstens, Dave Lewis, Ian Munanura (online)

Ex Officio Members present: Jenna Baker, Cristina Eisenberg (online), Brent Klumph, Carli Morgan

I. Welcome, Overview of Recent & Upcoming Activities

The group reviewed the meeting agenda, the [forest planning website](#) which contains materials associated with past and future meetings, a diagram outlining the forest planning process, and they discussed a tentative timeline of activities for the next few months. The group currently awaits the results from the first round of the modeling exercise that will serve as the basis for assessing tradeoffs among different land allocation scenarios across the forest. This group has meetings scheduled once per month during winter term (late Jan, late Feb, and late March).

II. Indicators of Performance for Monitoring

A monitoring plan will be essential to assess whether the forest is meeting the mission and goals prescribed once the new plan is implemented, and therefore this group has been discussing objectives and associated indicators and measurements that would be needed to assess performance over time, keeping in mind that research forest staff capacity is limited. Building upon the group's effort during the last two meetings to discuss the first 47 of the 57 monitoring indicators proposed in the 2005 Plan, they discussed the remaining 10. These included several pertaining to relations with Tribal nations, sustainability, and adaptive management. After this, the group suggested new metrics needed to reflect current times. They looked back at the "Overarching Principles" document that the FPC and SAC developed a full year ago (a document created to summarize suggestions for the management of the McDonald-Dunn Forest in the context of the 3 missions of the Research Forests) and reflected on whether there were any fundamental issues not reflected in the collection of monitoring metrics that needed to be added. The group also looked at the list of monitoring objectives, as written in the 2005 Plan, and updated these to better reflect current times. New metrics were added to address communications about the Research Forests, tracking resilience/resistance to changing climatic conditions, and economic sustainability. It was noted that an additional metric may be needed to address interpretation of cultural resources; the group will reconsider this after viewing an updated version of the entire list. There are several metrics that were noted by the group over the course of our recent discussions as needing review after the entire list was compiled. By the end of this discussion, the total number of metrics to be monitored was 39, with 10 pertaining to the first mission, 15 pertaining to the second, and 14 pertaining to the third.

During the course of discussion, it was suggested that this group consider making a recommendation for how long this plan should be in place before it is first revisited for updating, and also that this group consider when the monitoring will begin (i.e., will there be a brief transition period as the new plan is operationalized before monitoring actually begins?). Having these expectations written into the plan could prevent misunderstandings later.

III. Next Steps

- Holly will reorganize the list of indicators discussed during this meeting and the prior two and send it back out to the group to verify whether additional changes are suggested. (*See tables on the next few pages.*)
- The group will likely use the next meeting to develop ideas as to how to interpret the data from the first round of modeling. If time allows, they will also “finalize” the monitoring plan such that all objectives are clearly and accurately worded, and so that the monitoring covers all aspects needed to ensure adaptive management following plan implementation.

1st Mission: Create Opportunities for Education, Research, and Outreach.

Objectives	Indicators	Measurements	Retain?	How often to report?	Who is responsible?	Current Goal(s)	Other notes
1.1. Provide a diverse array of high-quality outdoor learning opportunities for college students.	A. Amount of use of Research Forest <u>by college students for research</u> and <u>by college classes for teaching</u> .	Usage trends compiled annually.	Yes	Annually	Research Forest Director	1,3	Ask motor pool to add questions for van rentals (what class/dept?), (purpose is research or teaching?).
	B. Type and number of requests for Research Forest Staff to provide <u>tours of forest operations for college classes</u> .	Research Forest Staff requests for class tours summarized annually.	Yes; modify to make intent clearer	Annually	Research Forest Director	1	
1.2. Provide opportunities to conduct innovative research on emerging issues.	A. Number of researchers' requests for establishment of <u>new research and demonstration projects</u> .	Annual report on progress.	Yes	Annually	Research Forest Director	1, 3	Consider noting new use reflected by gate key requests from key shop.
	B. <u>Number of new publications</u> and <u>number of citations</u> of publications describing research done on Research Forests in academic and trade publications.	Number of publications and citations compiled each year; archive in online research database.	Yes	Annually	Research Forest Director	1, 3	
	C. Proportion of active research sites on Research Forests that are not disturbed or vandalized.	Report on research disturbance and summary of protection measures compiled annually.	Yes	Annually	Research Forest Director	1,3	

1.3. Provide a diversity of high-quality outdoor learning opportunities for a variety of audiences (e.g., natural resource professionals, neighbors, youth, recreational users, civic groups).

A. Number of requests for public tours, including K-12 school groups.	Annual report.	Yes	Annually	Recreation Manager	1, 7
B. Number of Research Forest operations, research and demonstration plots featured in <u>outreach events</u> and <u>tours</u> conducted by OSU and others.	Annual report of operations includes list of tours and events.	Yes; modify to reduce redundancy with others	Annually	Instructors	1, 3, 7
C. Knowledge gained by Research Forest visitors from informational kiosks.	Survey of visitors.	Yes; modify to increase precision	Every 5 years	Recreation Manager + Professor with Student	1, 7

Make this an expectation during faculty annual evaluations to self-report their use of the forests in a tracking system.

Check later if this is redundant with other metrics associated with 3rd Mission, once those are complete.

1.4. Provide strategic and effective communication about the Research Forests.

A. Amount of website, social media, and newsletter engagement.	Digital and social media analytics.	NEW	Annually	Recreation Manager	1, 7
B. Uptake of hard copy materials at trailheads.	Number of copies printed.	NEW	Annually	Recreation Manager	1, 7

2nd Mission: Demonstrate Conservation, Resilience, and Economic Sustainability.

Objectives	Indicators	Measurement	Retain?	How often to report?	Who is responsible?	Current Goal(s)	Other notes
2.1. Demonstrate environmental sustainability Demonstrate examples of different strategies and practices for managed forests in the region. Manage and harvest forest growth sustainably through time in conformance with management strategies and goals.	A. Representative examples of management and restoration practices implemented for each of the 5 management strategies.	Annual report of operations summarizes # of acres in each management strategy and each EOC, along with a comparison or acreage with acreage goals.	Yes	Annually	Research Forest Manager & Director	2, 5, 9	Would it make sense for these two objectives to be combined into one titled 'Demonstrate environmental sustainability'?
	B. Relation of actual harvest to decadal harvest scheduling targets met for each management strategy.	Annual report on harvest type acres and volume by management strategy relative to the plan.	Yes	Annually	Forest Manager	2, 5, 9	See above.
2.2. Demonstrate carbon accounting.	A. Estimates of above ground carbon stores for each of the 5 management strategies.	Five-year report estimates above ground carbon for each management strategy and each EOC.	Yes; modified to reflect carbon accounting	Every 5 years	Inventory Manager	2, 5	
2.3. Demonstrate stewardship by meeting or exceeding all laws.	A. Success in operational practices meeting or exceeding OR FPA regulations including where research projects dictate testing an alternative approach.	Annual report of operations documenting # of acres where OR FPA has been met, exceeded, or deviated from to facilitate teaching, research, or demonstration.	Yes	Annually	Research Forest Manager & Director	2, 5	Brent & Fitz may consider other potential metrics to report here.

	B. Research Forest participation statewide conservation initiatives (e.g., the Oregon Plan for Salmon and Watersheds).	Annual report that summarizes the initiatives participated in.	Revisit	Annually	Research Forest Manager & Director	2, 5	Are there are other statewide initiatives that should be added rather than this one specific example?
2.4. Demonstrate conservation by sustaining and restoring native species, their habitats, and ecosystem diversity.	A. Protection of species of conservation concern.	Periodic report of known locations of these species and occupancy estimates.	Revisit	TBD once species are known	TBD once species are known	2, 5	Revisit once we have a species list from INR.
	B. Distribution of tree species, size, and structural forest characteristics.	Report on inventory measurements at a level sufficient to maintain stand-level descriptions.	Yes	3-5 years	Inventory Manager	2, 5	If a new position were added to the Research Forest staff, additional data could be reported on.
	C. Distribution and quantity of legacy structures/character trees and standing dead wood in clearcut stands pre-harvest.	Annual report of leave tree data by harvest unit and inventory of snags every 10 years.	Yes	Variable (annually + every 10 years)	Inventory Manager & Timber Program Manager	2, 5	
	D. Invasive species mitigation activities.	Annual report of # of acres treated for each targeted species.	Yes	Annually	Reforestation Manager	2, 5	
2.5. Demonstrate long-term resistance and resilience to climate change and associated perturbations.	A. Use multiple knowledge systems to track forest resistance and resilience to changing climate.	Metrics from modeling effort in concert with Indigenous Knowledge.	NEW	Every 5 years	Research Forest Director	2, 4, 5	
2.6. Demonstrate economic sustainability.	A. Examine all revenues relative to all costs.	Annual report.	NEW	Annually	Business Manager	2, 5, 8, 9	
	B. Reserve account status.	Annual report.	NEW	Annually	Business Manager	2, 5, 8, 9	

	C. Economic development.	??????	Revisit	??????	??????	2, 5, 8, 9	consider jobs and multipliers
	D. Diversify revenue sources and in-kind support.	Annual report.	Yes, modified to be less specific	Annually	All Research Forest Staff	2, 5, 8, 9	
2.7 Use monitoring plan to adapt management direction.	A. Implement strategic monitoring.	Annual report	Yes, modified	Annually	All Research Forest Staff	2, 5, 8, 9	

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3rd Mission: Support Social & Cultural Values of Forests.

Objectives	Indicators	Measurement	Retain?	How often to report?	Who is responsible?	Current Goal(s)	Other notes
3.1. Provide nature-based recreation desired by local users that minimizes negative impacts while fitting in with the goals of the forest.	A. Estimated number of recreation visits per year by major category of use.	Conduct a survey every five years.	Yes	Every 5 years	Rec Manager & grad student	6, 7	Is 5 years best? Synch with below if a different timing is preferred.
	B. Satisfaction of visitors with recreation opportunities.	Conduct a survey every five years.	Yes	Every 5 years	Rec Manager & grad student	6, 7	Is 5 years best? Synch with above. This was modified from original (which mentioned "ecological damage") to reflect more specific metrics.
	C. Authorized and unauthorized trails.	Report # of miles of each trail type every 5 years.	Yes	Every 5 years	Rec Manager or Field Coordinator	6, 7	
3.2. Minimize conflicts between recreation users and others.	A. Number, type, and location of conflicts.	Report annually from the database.	Yes	Annually	Rec Manager	6,7	
3.3. Engage the community with the research forest recreation program.	A. Numbers and types of actions taken to engage recreation users in strategies to improve performance on recreational goals.	Report annually.	Revisit	Annually	Rec Manager	6, 7	Consider if this indicator is best for capturing the intent of this objective.
	B. Volunteer efforts on the Research Forests.	Annual report of # of volunteer hours and value of time invested.	Yes	Annually	Volunteer Coordinator	6, 7	

3.4. Proactively establish, maintain, and enhance good relationships with neighbors and others connected with the Research Forest.	A. Communication with neighbors and the community.	Annually report # of subscribers to the newsletter, website traffic, and social media engagement.	Yes	Annually	Rec Manager	6, 7	This was modified from original (which highlighted communication about the plan) to reflect communication more broadly. Ask a question on the recreation survey to assess this; the survey asks about proximity to forest so can extract data from neighbors
	B. Understanding by neighbors of College Forest's management policies.	Survey every five years.	Yes	Every 5 years	Rec Manager & grad student	7	
3.5. Sustain, and restore, if necessary, known examples of natural heritage resources.	A. Natural heritage sites registered by the Oregon Natural Heritage Program that are identified and maintained.	Report from the database.	Revisit	?	?	2, 6, 7	Investigate the OR Natural Heritage Program to determine if this should be retained, modified, or dropped
3.6. Protect Indigenous and non-indigenous cultural resources during forest management activities.	A. Continue to identify and protect cultural resources prior to ground-disturbing activities.	Annual report on surveys and protection measures for cultural resources before disturbance.	Yes	Annually	Forest Manager	5, 7	Add something here or elsewhere about partnering with Tribes when developing outreach around ecocultural resources

3.7. Maintain relations between the College and the federally recognized Indigenous Tribes of Oregon that are based on trust and mutual respect.

A. Co-stewardship with the federally recognized Kalapuyan Nations in early stages of revisions to Research Forest management plans on the formulation of goals and objectives for ecocultural resources.

Status update.

Yes, modified to reflect current times

Annually

Director with Tribes

2, 7

B. Development of Memoranda of Understanding (MOU) with appropriate federally recognized Kalapuyan Nations that cover partnership activities between the Tribes and College in protecting and enhancing Tribal ecocultural sites on Research Forests.

Status update.

Yes, modified to reflect current times

Annually

Director with Tribes

2, 7

C. Co-implementation of the Memorandum of Understanding with the federally recognized Kalapuyan Nations and modification as necessary.

Status update.

Yes, modified to reflect current times

Annually

Director with Tribes

2, 7

D. Discussion of annual operations plans, and ideas to improve ecocultural resource stewardship with the Research Forest staff and the appropriate Tribal staff.

Annual meeting between the College and appropriate Tribes.

Yes, modified to reflect current times

Annually

Director with Tribes

2, 7