

OSU College of Forestry
McDonald-Dunn Research Forest Faculty Planning Committee (FPC) Meeting #21
22 February 2024, 11:30am-1:30pm
316 Peavy Forest Science Center and Zoom

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

Ex Officio Members present: Steve Fitzgerald (online), Brent Klumph (online), Carli Morgan

I. Welcome, Overview of Recent & Upcoming Activities

Following introductions, it was announced that Cristina Eisenberg would transition from ex officio to full FPC member, to reflect her degree of involvement and decision-making in the aspects of the plan pertaining to Indigenous knowledge and Tribal engagement. Next, 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 talked through the draft Table of Contents of the new plan to ensure understanding of how the topics of discussion at this meeting would fit into the plan. Chapter 4, which will outline plan implementation, is expected to encompass monitoring, reporting, adaptive management, and roles and responsibilities. After looking across the rest of the new plan, several suggestions and questions emerged. It was recommended that Indigenous knowledge and Tribal representation be mentioned early and throughout, in addition to section 3.1 which is entirely devoted to this. It was also clarified that results of the current forest modeling effort would appear in sections 2.8 (current forest conditions), 3.3.2 (processes used to allocate land to each management strategy), 3.3.3 (timber harvest schedule), and 3.3.4 (anticipated future forest conditions).

II. Indicators of Performance for Monitoring

During the 2 most recent FPC meetings, the group looked back at monitoring expectations written into the 2005 McDonald-Dunn Plan and suggested additions, deletions, and changes to this list so that it would better reflect modern needs and expectations. Now, the group looked at this list after being reminded of 2 bullet points pertaining to monitoring included in the “Overarching Principles” document created by the FPC and SAC last winter. These bullet points expressed aspirations to create a monitoring plan that is feasible for Research Forest staff to complete, that allows for forest plan adjustment over time in response to unanticipated circumstances, and that couples traditional technological approaches with new. The following suggestions emerged from the group:

- The plan should mention the idea of remote sensing as a possible means of inventory, highlighting that a goal of the forest inventory program is to begin integrating new technology (*added to Objective 6A and will be added to the text of the plan for monitoring in general*).
- Include the concept of repeatedly re-running the modeling that is being customized now by consultants every 5 years with new data, to ensure all is on track. Consultants may need to be hired to enable this (*see new Objective 17A*).

- It is prudent to assume the Research Forest staff remains at the current level for the foreseeable future. Members of the CoF leadership team have been discussing with the Research Forest staff the past 2 months what additional position(s) would be the highest priority if it were possible to grow the workforce. These conversations will position the College to bring on new staff if/when the budget allows.
- Although it is recognized that additional staff are needed to enable increased workloads associated with efforts such as co-stewardship with Tribes, more extensive restoration, and increased educational opportunities, it is an expectation that the Research Forests be financially self-sustaining. Foundational funding is needed to support permanent staff, and complimentary funding for additional work could be generated to meet additional needs. The group suggested consideration of other means of revenue generation, such as (*see Objective 10C*):
 - applying for a *Good Neighbor Authority* grant to facilitate work with Tribes on the Research Forests
 - using grants to add fixed-term employees for a period of time for special projects on the forests
 - requiring researchers to include Research Forest operational expenses when applying for grant funding
 - using the Research Forests as a location to host grant-funded training on ecocultural restoration
 - soliciting donations to support the Research Forests

It was suggested that the FPC schedule time for additional discussion of innovative funding possibilities, and consider broadening participants in this conversation to generate innovative ideas.

- It was suggested that surveys be conducted at regular intervals to track the status of rare species on the forests. Recommendations included a 2-tiered approach (*see Objective 8A*):
 - Summarize data collected by citizen/community scientists (e.g., iNaturalist) to inform records of presence/absence of species of concern annually.
 - Hire specialists (e.g., botanists, wildlife biologists) periodically to survey every 5 years for species not detected by the previous method.
- It was recommended that the monitoring indicator pertaining to research forest participation in statewide conservation initiatives be retained, but not be constrained by including any specific examples, since these will change over time (*see simplified Objective 7B*).
- The indicator pertaining to numbers and types of actions taken to engage recreational users and strategies to improve performance on recreational goals will be discussed by experts with recreation expertise to assess practicality (*see Objective 13A*).
- Online investigation indicated that the Oregon Natural Heritage Program includes specific locations of interest. None of these currently occur in the McDonald-Dunn Forests, so this metric will likely be removed from the list.
- The objective that pertains to long-term resistance and resilience to climate change and other perturbations needs additional discussion after the modeling is complete. Some *cultural keystone species* could be monitored to detect change over time, as could coverage of plant associations that may shift in distribution. (*See new Objective 9B*).
- The entire monitoring plan should be revisited once the modeling results currently being worked on are completed, and the full Research Forest staff should look at the monitoring plan to weigh in on the concept of feasibility.

III. Decision-making Processes

The group reviewed content from the 2005 McDonald-Dunn Plan pertaining to decision-making processes for the Research Forests. The 2005 Plan described the role of the CoF Forestry Executive Committee (FEC), Research Forest staff, Dean, and committees designated by the FEC and Dean. The following suggestions emerged now from the FPC:

- A *technical advisory committee* (TAC), comprised of individuals with forest management expertise from varied disciplinary backgrounds, should be convened to make decisions about the forests. It was questioned whether the FEC should remain as a decision-making body about management matters pertaining to the forests. A suggestion was made that a subset of the current FPC could become part of this new TAC to ensure some continuity of thought. It was proposed that the TAC include representatives from across colleges at OSU, Tribes, and individuals from other agencies and organizations with pertinent expertise. (*See new Objective 17B*).
- An independent review by individuals external to the university with relevant expertise could be convened on a 10-year basis. The qualifications of the individuals should be described in the plan, but individuals should not be identified at this time since the group would not be convened until 2034. (*See new Objective 17C*).
- Details about a public notification process should be defined, perhaps using a 2-tiered approach that details one process for small exceptions and another for more substantial amendments. (*This will be added to the text of the plan describing roles and responsibilities rather than to the monitoring protocols*).

IV. Next Steps

- Holly will revise the list of indicators discussed during this and the past 2 FPC meetings and send it back out to the group to verify whether additional changes are suggested. *See tables on the next few pages*.
- Holly will compile suggestions made by the group regarding decision making process and send it back out to the group to verify whether additional changes are suggested. *See section III above and tables on the following pages*.
- The group will likely use the next FPC meeting to develop ideas as to how to interpret the data from the first round of modeling. They will also discuss the need to schedule additional meetings.

Monitoring objectives, indicators, and measurements for the 2024 McDonald-Dunn Forest Plan, sorted according to research forest mission.

1st Mission: Education, research, & outreach

Obj 1 - Provide a diverse array of high-quality outdoor learning opportunities for students from CoF, OSU, and other institutions of higher education.

Indicators	Measurement	Retain?	How often to report?	Who is responsible?	Current Goal(s)
A. Amount of use of Research Forest <u>by college students for research</u> and <u>by college classes for teaching</u> .	Report on usage summarized	Yes	Annually	Research Forest Director	1,3
B. Type and number of requests for Research Forest Staff to provide <u>tours of forest operations for college classes</u> .	Requests received by Research Forest Staff to provide class tours summarized	Yes	Annually	Research Forest Director	1

Obj 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> .	Report on progress	Yes	Annually	Research Forest Director	1, 3
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 and archived in research database	Yes	Annually	Research Forest Director	1, 3
C. Proportion of active research sites on Research Forests that are not disturbed or vandalized.	Research disturbance report and summary of protection measures	Yes	Annually	Research Forest Director	1,3

Obj 3 - Provide a diversity of high-quality outdoor learning opportunities for a variety of audiences including natural resource professionals, neighbors, youth, recreational users, civic groups, and others.

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

Obj 4 - Provide strategic and effective communication about the Research Forests.

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

2nd Mission: Demonstrate conservation, economic sustainability, and resilience

Obj 5 - Demonstrate examples of different strategies and practices for managed forests in the region

Indicators	Measurement	Retain?	How often to report?	Who is responsible?	Current Goal(s)
A. Representative examples of management and restoration practices implemented for each of the 5 management strategies.	Summarize # of acres in each management strategy and each EOC (ecosystem of concern), along with a comparison of this acreage relative to acreage goals.	Yes	Annually	Research Forest Manager & Director	2, 5, 9
B. Relation of actual harvest to decadal harvest scheduling targets met for each management strategy.	Summary of harvest type acres and volume by management strategy relative to the plan.	Yes	Annually	Forest Manager	2, 5, 9

Obj 6 - Demonstrate carbon accounting.

A. Estimates of above ground carbon stores for each of the 5 management strategies.	Estimate above ground carbon for each management strategy and each EOC, using multiple approaches when feasible.	Yes	Every 5 years	Inventory Manager	2, 5
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Obj 7 - Demonstrate stewardship by meeting or exceeding all laws, except where research requires deviation from laws and rules, and exemption is obtained from appropriate regulatory agencies.

A. Success in operational practices meeting or exceeding OR FPA regulations including where research projects dictate testing an alternative approach.	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
B. Research Forest participation in statewide conservation initiatives.	Report summarizing the initiatives participated in.	Yes	Annually	Research Forest Manager & Director	2, 5

Obj 8 - Demonstrate conservation by sustaining and restoring native species, their habitats, and ecosystem diversity.

A. Conservation of rare and/or culturally or ecologically important species.	Status update for each species on the forest obtained through (1) data on presence/absence annually from existing community science and (2) hiring technical specialists every 5 years for surveys of species anticipated but not detected.	Revisit	Annually and once every 5 years	Research Forest Director and hired consultants	2, 5
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

C. Distribution and quantity of legacy structures/character trees and standing dead wood in clearcut stands pre-harvest.	Report # of leave tree per harvest unit annually and conduct inventory of snags every 10 years.	Yes	Variable (annually and every 10 years)	Inventory Manager & Timber Program Manager	2, 5
D. Invasive species mitigation activities.	Report of # of acres treated for each targeted species.	Yes	Annually	Reforestation Manager	2, 5
Obj 9 - 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.	Pair metrics from modeling effort in concert with Indigenous Knowledge.	NEW	Every 5 years	Research Forest Director	2, 4, 5
B. Track changes in forest composition.	Report changes in presence of <i>cultural keystone species</i> , coverage of plant associations, and levels of tree mortality caused by insects and pathogens.	NEW	Every 5 years	Research Forest Director	2, 4, 5
Obj 10 - Ensure financial sustainability.					
A. Examine all revenues relative to all costs.	Report all funds in and out.	NEW	Annually	Business Manager	2, 5, 8, 9
B. Reserve account status.	Calculate amount of funds in fiscal reserves to ensure continued forest operations during lean years.	NEW	Annually	Business Manager	2, 5, 8, 9
C. Diversify sources of financial support for the forests.	Summarize grants, donations, in-kind support, and other supplemental funding.	Revisit	Annually	All Research Forest Staff	2, 5, 8, 9

3rd Mission: support social & cultural values of forests

Obj 11 - Provide nature-based recreation desired by local users that minimizes negative impacts while fitting in with the goals of the forest.

Indicators	Measurement	Retain?	How often to report?	Who is responsible?	Current Goal(s)
A. Estimated number of recreation visits per year within major categories of use.	Conduct a survey.	Yes	Every 5 years	Recreation Manager & grad student	6, 7
B. Satisfaction of visitors with recreation opportunities.	Conduct a survey.	Yes	Every 5 years	Recreation Manager & grad student	6, 7
C. Authorized and unauthorized trails.	Report # of miles of each trail type.	Yes	Every 5 years	Recreation Manager or Field Coordinator	6, 7

Obj 12 - Minimize conflicts between recreation users and others.

A. Number, type, and location of conflicts.	Report from the database.	Yes	Annually	Recreation Manager	6,7
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Obj 13 - 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.	Compile summary.	Revisit	Annually	Recreation Manager	6, 7
B. Volunteer efforts on the Research Forests.	Report of # of volunteer hours and value of time invested.	Yes	Annually	Volunteer Coordinator	6, 7

Obj 14 - Proactively establish, maintain, and enhance good relationships with neighbors and others connected with the Research Forest.

A. Communication with neighbors and the community.	Summarize # of subscribers to the newsletter, website traffic, and social media engagement.	Yes	Annually	Recreation Manager	6, 7
B. Understanding by neighbors of College Forest's management policies.	Conduct a survey.	Yes	Every 5 years	Recreation Manager & grad student	7

Obj 15 - Protect Indigenous and non-indigenous cultural resources during forest management activities.

A. Continue to identify and protect cultural resources prior to ground-disturbing activities.	Report on surveys and protection measures for cultural resources before disturbance.	Yes	Annually	Forest Manager	5, 7
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Obj 16 - Maintain relations between the College and the 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	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	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	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.	Hold meeting between the College and appropriate Tribes.	Yes	Annually	Director with Tribes	2, 7

Spanning across Missions: Underpinnings of Accountability and Continuous Improvement

Obj 17 - Use of monitoring plan to adapt management direction and ensure transparency.

Indicators	Measurement	Retain?	How often to report?	Who is responsible?	Current Goal(s)
A. Develop new projection of current and future forest conditions using the model developed during 2024.	Report whether projections made in 2024 remain accurate, and if not, provide fresh updates.	NEW	Every 5 years	Inventory Manager or external consultant	2, 5, 8, 9, 10
B. Form a <i>Technical Advisory Committee</i> to advise the Dean on decisions regarding plan exceptions and amendments.	Meet as often as needed and summarize decisions annually.	NEW	Annually	Dean	2, 5, 8, 9, 10
C. Convene a team external to the university with relevant expertise for an external review.	Evaluate whether the forest plan and associated monitoring efforts are functioning well.	NEW	Every 10 years	Dean	2, 5, 8, 9, 10