POLICY PATHWAYS TO SUSTAINABLE FORESTRY—A HISTORICAL PERSPECTIVE

Prepared for the
Oregon Department of Forestry

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July 2013

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ACKNOWLEDGEMENTS

Kevin Birch, current director of the Forest Resources Planning Program, recognized the importance of the *Forestry Program for Oregon* documents. Over the past 36 years, these documents have provided an important policy base for the work of the Board of Forestry and the Department of Forestry. Kevin recognized the need to capture the historical memory of the processes and information used to complete the six *FPFO*'s to date. Therefore, he commissioned the writing of this document "*Policy Pathways to Sustainable Forestry—A Historical Perspective*." Many people contributed to this document by helping scope the project and then reviewing and commenting on the draft document. In alphabetical order they were: Mike Beyerle, Kevin Birch, Jim Fisher, Gary Lettman, Ted Lorensen, Janet McLennan, David Morman, and Dave Stere. All of these people were personally involved in writing or helping write one or more of the six editions of the *Forestry Program for Oregon*. Their review and comment on the draft document were extremely helpful. Dan Thorpe researched the Medford Mail Tribune archives and found the two Eric Allen editorials used in this paper. Sharon Martin formatted the document and brought the attachments into the document. A special thanks to Jim Fisher for bringing reviewer comments into the document and editing it.

POLICY PATHWAYS TO SUSTAINABLE FORESTRY—A HISTORICAL PERSPECTIVE

Findings and Lessons Learned

In 1911 the Oregon Legislative Assembly established the Oregon Board of Forestry and the Oregon Department of Forestry. Under ORS 526.016 the general duties of the Board include: "supervise all matters of forest policy and management under the jurisdiction of this state…" ORS 526.041 states in part that the general duties of the State Forester, under the general supervision of the Board of Forestry include: "(4) Collect data relative to forest conditions; and (9) Publish such information on forestry as the forester determines to be in the public interest" [Attachment 1]

The Board and the State Forester have approached these statutory requirements in different ways during the last 100 years [*Fisher: Honoring a Century of Service: The Centennial History of the Oregon Board of Forestry and the Oregon Department of Forestry—1911-2011. Oregon Department of Forestry*].

In 1972, Eric Allen, the highly respected editor of the *Medford Mail Tribune*, wrote two editorials criticizing the Board of Forestry for failing to provide leadership on forest policy issues facing the state [Allen: "Forest Policy: Fox and Chickens". *Medford Mail Tribune,* May 21, 1972 (Attachment 2A), and "Worrying About Oregon's Forests". *Medford Mail Tribune, August 26, 1972 (*Attachment 2B)]. Issues cited by Allen included timber supply and other resource values important to the public.

Following the second editorial by Allen, there was an exchange of correspondence between State Forester Ed Schroeder and Allen pertinent to Mr. Allen's interpretation of what should be the Board's involvement in forest resource concerns. Allen indicated that, in his opinion, the Board had a major responsibility to respond to the total resources in Oregon as they applied to the present, near future and long-range economics. The four specific points that he mentioned in his letter were assessment, finding remedies, leadership, and administration.

At the same time the USDA Forest Service had completed timber supply studies indicating that nationally and regionally, timber supply would dwindle as forests were converted from old-growth to second-growth timber. There also was a growing public concern over the impact of timber harvesting on other forest values. The forest inventory data from the federal studies were fairly general and not amenable to breaking down the information into state or sub-state regions. As a result, there was considerable controversy over timber supply projections and the impact of timber harvesting on other resource values.

Before State Forester Schroeder presented his recommendations to the Board for a major Department effort to address the issues raised by Editor Allen, he held an evening dinner

meeting with key staff. After outlining his proposed plan, he sought and obtained a commitment from staff to accept the assignment of making the study of Oregon's forests with the increased workload it would demand.

After the Board approved the State Forester's plan for the study in 1973, the Department responded to Editor Allen's editorials by forming a Department team within a Forest Resources Planning Program. This team would collect and analyze data about Oregon's forests and formalize the process for developing and communicating Board policies to the public.

The report prepared by the Department and adopted by the Board was titled the *Forestry Program for Oregon* or *FPFO* and published in 1977. While the process developed has been followed over the past 36 years, it has become more sophisticated. It has evolved from looking at timber supply to evaluating Oregon's forests against a set of state criteria and indicators that evolved from the Montreal Process [Attachment 3].

In looking back at the development and evolution of the *FPFO*, there are several lessons that have evolved through six editions of the document. In summary they are:

- Developing the *FPFO* is a tedious process but has proved to be of great value to the Department and the Board. Significantly, the process harmonized the thinking of the Board of Forestry and the Department. However, to be successful, the following factors must be addressed:
    - There must be strong leadership by Department executives to keep the Board and the Department focused on gaining participation from all involved parties, public and private, in updating future *FPFOs* and in administering the current *FPFO.*
    - Department staff needs to help keep the Board informed of changing issues as they occur and to provide an orientation for new Board members on the statutes that guide them, agency programs and budgets, public opinions and values, and a history of the *FPFO.*
    - Recent assessments and work on the Board's Indicators of Sustainability have made it clear that partnerships with other state and federal agencies and Department staff are needed to provide the information to credibly update the forest assessment and the *FPFO.*
    - Having dedicated resources planning staff is key to credibly executing the Board's and the State Forester's responsibilities under ORS 526.016 and 526.041.
- Staff conducted assessments of Oregon's forests, i.e. knowing the facts about Oregon's forests, is essential to deriving good public policy. In doing so, large data gaps for non-timber resources must be overcome.
- Using public opinion surveys, to understand public knowledge and beliefs/values, are helpful to sort through the many and varying opinions about how to manage Oregon's forests.

- Various public participation formats (focus groups, town hall meetings/Board work session, and public testimony) are important to engage the public and result in a stronger, more relevant document. However, public input should help inform Board decisions, not form Board decisions.
- Using facts about Oregon's forests, public opinions, and public input provides a foundation for Board debate about the vision for Oregon's forests. This debate is essential to finding the public interest. However, there are several confounding factors that must be overcome:
    - Those interested in Oregon's forests have not come together on a vision for Oregon's forests and generally are not willing to listen nor are they willing to look for mutually beneficial solutions. There is a need for an improved, shared understanding by all parties about the linkages among the environmental, economic, and social aspects of forests and to understand how specific on-the-ground approaches affect these three aspects of sustainability.
    - Most issues are highly polarized, single-issue focused or single ownership focused and many of the participating voices are on the margins.
    - There is an absence of a shared policy approach across federal, state, and local governance.
    - Thus, it is difficult for the Board to be successful in a policy environment where there is not a shared professional or general public understanding of what sustainable forest management means or how it can be evaluated for its effectiveness in meeting any desired balance of environmental, economic, and social needs.
- The Board's view of the public interest should be codified in the Board's mission, vision, values, goals and objectives and intended actions. The framework of sustainable forest management, as expressed in Oregon's Sustainable Forestry Indicators, is an extremely useful tool to sort through various interests opinions and seek the public interest.
- The Department has historically used a nested approach in developing its biennial budget submittals [see Attachment 8] and in developing programmatic actions consistent with the *FPFO*. This has given the Department good credibility with the Oregon Legislative Assembly and many publics. The linkage between the *FPFO* and Board agendas further strengthens the role of the *FPFO* and provides public clarity behind Board actions.
- Non-regulatory policy is as important as regulatory policy, but generally, not adequately funded to be effective over the long term.
- The *FPFO* has provided *g*uided policy positions with the Governor, Oregon Legislative Assembly, and Congressional Leaders.

- The *FPFO* is an internal and external communication tool—the *FPFO* has provided a solid foundation for communicating with the public and others about Oregon's forest issues, goals, policies, and objectives.
- Several successful legislative initiatives have evolved from the *FPFO.*

History of the FPFO's

Eric Allen, editor of the *Medford Mail Tribune* is credited with prompting the Board of Forestry to take a more expansive forest policy role for all forest lands in Oregon by writing two editorials in 1972 that were critical of the Board's failure to provide leadership on forest policy issues facing the state [Attachments 2A and 2B: "Forest Policy: Fox and Chickens" and "Worrying About Oregon's Forests."] Through the leadership of State Forester Ed Schroeder and Board of Forestry Chair Carl Stoltenberg, the Department launched an important new program title "Forest Resources Planning" to respond directly to Mr. Allen's concerns. This effort led to a series of six documents titled the "*Forestry Program for Oregon*" (aka *FPFO*) over the past 35 years. Many hours of dedicated staff time, by a large number of people, were required to collect the data, analyze it, evaluate the information, and recommend a *Forestry Program for Oregon* to the Board of Forestry. In addition to the staff time, the Board members themselves were actively involved in the discussions that eventually led to the published documents.

Most *FPFO* editions have included a formal forest assessment, various versions of public input, Board debate, and finalization of the program. Significantly, the process of developing these documents harmonized the thinking of the Board members and the Department. In turn, both were able to use these documents as a coherent voice regarding Oregon's forest policy as they advised the Governor, Legislative Assembly, members of Congress and others about resolving s forest polices issues important to the state.

This history traces the development of each *FPFO* and the major actions taken by the Board and Department in producing the six *FPFOs* beginning in 1972.

1977 Forestry Program for Oregon—Timber Supply Today and Tomorrow

At its December 14, 1972 meeting the Board of Forestry's State Forests Committee recommended that the full Board consider adopting a coordinating role to respond to Mr. Allen's concerns about the Board needing to assess Oregon's forests, find remedies to issues identified, providing leadership to resolve these issues and administration. The recommended role included a recommendation that the Board and Department assembled a staff of current and new employees to develop an assessment of facts about Oregon's forests. These resulting documents and actions included:

1. ***Resume of Published Information on Oregon's Timber Supply.*** (***Voelker, 1973).***
   This document summarized the published information available at the beginning of the Board's forest resource study. It provided a preliminary view of data sources and projections.

Eight national and regional studies had predicted a range of future timber availability from modest increases to a decline in available softwood supplies. Variations among these reports hinged on their respective basic assumptions. In reviewing these studies, the Department was concerned about the unknown future management intensity on different ownership classes, the reduction of the commercial forest land base, and little public confidence in the studies being evaluated.

2. ***Town Hall Meetings***.

In October 1973, the Board sponsored three town hall meetings, one each in Medford, Eugene, and LaGrande. Some 250 people attended. The three principle concerns identified were timber availability, future timber supply, and protection of environmental values.

3. ***Staff Report on the Forest Resource Study and Plan for Drafting Preliminary Study Recommendations*. (*Brown & Voelker, 1974).***

This report was a first attempt by staff to establish a work plan for addressing the Board's desire to evaluate Oregon's forests and to develop a forestry program. It recommended establishing a steering committee comprised of Department staff, Dr. John Beuter from Oregon State University College of Forestry and task forces to focus on the identified issues.

The preliminary study recommendations were presented at an August 22, 1974 meeting of the Board's Land Management Services Committee, the former State Forests Committee. The problem statements identified were: data collection; land use base estimation; interpretation of data; utilization; environmental protection; and wood growth. See the Board's meeting agenda and minutes for the full report.

Staff recommendations were accepted in part and deferred in part. The key concern of the committee was the need to bring all the necessary information together and release it in one package, rather than piecemeal. This decision led to a plan for a series of studies and reports, concluding in a forestry program.

4. ***Catalog & Index of Existing Resource Data*. *(Moreland, Unruh and Smith, 1975).***

The Department contracted with Moreland, Unruh and Smith architects and planners in Eugene to assemble a forest resource catalog, an annotated bibliography of available forest resource data. The contract was scheduled for completion by December 31, 1975 (note: the bibliography was completed, but no copy could be found in the Department's achieves).

5. ***An Appraisal of Forestry Policy and Forestry Program Formulation in the State of Oregon. (Newport, 1975).***

   This report was prepared by forestry consultant Carl Newport in November 1975. It evaluated the Board's and Department's responsibilities, examined existing state policies and program formulation, existing data collection and resource evaluation. It proposed a framework for a forest policy and program for Oregon.

   The key recommendations were:

   - current forest policies were scattered among tax laws administered by the Department of Revenue, several forestry statutes, Board and Department policies and operating procedures. The Board should develop a comprehensive, coherent set of policies to guide the state.
   - development of policies and program for the Board's responsibilities requires a sound and thorough knowledge of the forest resource situation in Oregon. The general knowledge of Board members and staff and conventional wisdom were no longer adequate relative to the importance of the responsibilities and the changing situations.
   - the Department needed a dedicated staff of 4 to 8 persons to guide this effort.

   This report heavily influenced Board and Department actions in addressing public concerns about Oregon's forests. The Department established a forest resource planning team under the leadership of a newly established Assistant State Forester position. The team embarked on gathering the necessary information for the development of a Board policy on the Oregon's forest resource.

   The summary and conclusions and recommendations of this report are as relevant today as when it was written in 1975 [Attachment 4].

6. ***Timber for Oregon's Tomorrow: An Analysis of Reasonably Possible Occurrences. (Beuter, Johnson, & Scheurman, 1976).***

   The Board realized that a new timber supply study that they would use as a basis for any action would require the confidence of both the Board and the public. In 1975, the Board directed the Department to contract with Oregon State University Forest Research Laboratory, College of Forestry for such a study.

   Dr. John Beuter led a team of Norm Johnson and Lynn Scheurman to complete this study. They arranged with public and industrial landowners to obtain their proprietary forest inventory data. The team also used information from Department staff and other agencies including a limited amount of forest survey data from the USDA Forest Service to supplement their data needs. The data were organized around 10 timbersheds, seven in western Oregon and three in eastern Oregon.

The study showed that under current policies timber supplies would decrease in all western Oregon timbersheds unless there were changes in policies and land management intensities. In eastern Oregon, timber supplies could be maintained for the next 30 years under current policies. However, in future supply studies eastern Oregon forecasts later were lowered when diameter increment models were adjusted. For both western and eastern Oregon, the study showed that federal land management would need to play an important role in timber supply to maintain harvest levels in the state.

This study provided one of the key foundations for future Board policies on timber supply. It also captured the attention of the news media and the public.

7. ***Douglas County Forest Condition Mapping and Forest Volume Inventory Project: Final Project Report*. (*Oregon Department of Forestry, 1978)*.**

The Pacific Northwest Regional Commission funded a pilot project to use remote sensing to inventory forests. The project identified Douglas County as the pilot area owing to future wood supply problems in the county, county interest in the project, and because Douglas County was identified as a timbershed in the *Timber for Oregon's Tomorrow* report. (Note: The Pacific Northwest Regional Commission was created with a U.S. Department of Commerce grant to stimulate the economy in the Pacific Northwest).

The project produced color-coded maps at two different scales. One map displayed nine general vegetative classes and a second map displayed 24 vegetative treatment opportunities. The project had several technical problems and, in the end, the statistics from the project were not useable. This was the first effort to use satellite imagery for forest resource inventory and analysis. While not successful in providing useful data to meet the questions of the time, results of the project provided important recommendations for future use of satellite data.

8. ***Forestry Program for Oregon Supplement No. l—Non-industrial Private Forest Management: An Action Recommendation*. (*Oregon Department of Forestry, December, 1977).***

One of the opportunities identified by the *Timber for Oregon's Tomorrow* report was increased timber supply from non-industrial forest land**.** *FPFO Supplement No. 1* recommended Board policies on management of these lands, outlined the importance of these lands to Oregon's future timber supply, assessed the need to increase production from these lands and recommended a program for achieving these objectives.

The Board adopted the policies recommended by the report and introduced legislation in the 1979 Legislative Assembly. The results were a statutory authority for the Department's Service Forestry Program, establishment of a seed bank for reforestation of non-industrial forest lands, and 12 new service forestry positions funded by the

state's General Fund. In addition, a grant provided by the Pacific Northwest Regional Commission funded a cost-share demonstration project to reforest underproductive forest land in the coast range (see report below). In 1993, this led to a reforestation tax credit for reforestation of underproductive forest land.

9. ***Forestry Program for Oregon Supplement No. 2: Underproductive Forest Lands in the Coast Range. (Oregon Department of Forestry, December, 1977).***

   During the discussion on future timber supply a large, but unknown amount of underproductive forest land in the Coast Range, was seen by many as an opportunity to increase long-range timber supply. Through a grant from the Pacific Northwest Regional Commission, the Department contracted high-altitude aerial photography mapping of the coast range, ground verification and benefit-cost analysis for converting underproductive forest land to productive forests.

   The project identified 568,400 acres of underproductive forest land that eventually could produce 31.5 billion board feet of timber over a 60-year rotation. The average benefit-cost ratio for the converting underproductive land was estimated to be 3.19.

   The report recommended several policy actions to address this issue. This report helped achieve the Legislative Assembly results in point 8 above. The report also provided useful information to the landowner community about the locations, treatments, and benefit-cost of converting underproductive forest land.

10. ***Forestry Program for Oregon: Timber Supply Today and Tomorrow. (Oregon Board of Forestry, April, 1977).***

    The *1977 FPFO* was viewed as a first report in a continuing effort to carry out Board policy and define the State Forester's responsibilities to collect data relative to forest condition and to publish such information on forestry as determined to be in the public interest. It recognized that considerable future effort would be needed to interface Phase 1, *Timber Supply Today and Tomorrow*, with the full range of multiple–use programs.

    The report was a program to sustain forest production while considering amenity values. The recommendations were divided into the following sections: management opportunities: conserving the forest land base, protecting the forest resource, and information and technology. This report was widely used by the Board and Department staff as they worked at the local, state, and national levels on issues addressed in the *FPFO*.

1982 Forestry Program for Oregon: An Action Program for the Eighties

In publishing the *1977 Forestry Program for Oregon* both the Board and the Department recognized that future efforts needed to go beyond timber supply. The challenge was to assemble sufficient facts and assessments for evaluation of non-timber resources, as well as

timber resources, as the basis for the next *FPFO*. This five-year effort resulted in the 1982 FPFO.

1. ***1980 Timber Supply Assessment: Projections of Future Available Harvests. (Stere, Hopps, and Lettman, 1980).***

   The *Timber for Oregon's Tomorrow* report was updated by the Department using the Oregon State University TREES model (Timber Resource Economic Estimation System) and an updated inventory. The study showed that timber supply in Western Oregon could be maintained or slightly increased. However several policy issues would need to be resolved. In eastern Oregon timber supplies were predicted to decline. These could be offset by increased harvest from federal forest lands.

2. ***Forest Policy Project. (Pacific Northwest Regional Commission, 1981).***

   The Pacific Northwest Regional Commission sponsored a grant to Washington State University to examine several regional forest resource management issues:

   - forest policy institutions and organizations.
   - demand for Pacific Northwest timber and timber products.
   - supply of Pacific Northwest timber.
   - economic analysis of non-timber uses of forest land in the Pacific Northwest.
   - socio-economic and environmental impacts of forest-based activities.
   - alternative forest policies for the Pacific Northwest.

   The reports were considered by the Department in developing the *1982 FPFO.*

3. ***Forest Resources Program for Oregon.*** (***Forest Resources Task Force, 1981).***

   During the late 1970's and early 1980's, state agencies individually were responding to federal forest planning documents. Governor Vic Atiyeh wanted a more coordinated approach. As a result, in 1979 he issued Executive Order EQ-79-25 creating a Forest Resource Task Force comprised of Oregon's natural resource agencies.

   Their task was to define and coordinate basic goals, policies, and objectives for a balanced multiple use of Oregon's forest resources. In addition, they were to define a process for developing a long-range coordinated program representing Oregon's interests in federal forest resource assessments and management. Membership of the task force was to represent Oregon on a regional and national level in developing forest resource programs that were consistent with Oregon's programs.

   The resulting report summarized each agencies legal mandates and identified 34 forest resource issues. For each issue the task force conducted studies and made recommendations for resolving the issue. This information was used by the agencies as

they compiled their individual responses to land management plans of federal agencies. These individual agency comments were compiled and combined into a recommended state position. This was reviewed by the Governor and then submitted to the federal agency as the official state position.

4. ***The Relationship Between the Forestry Program for Oregon and the USFS 1985 RPA Program. (Oregon Department of Forestry, 1983).***

   Under the 1985 Forest and Rangeland Renewable Resource Planning Act the USDA Forest Service established an elaborate planning and budgeting tool to guide congressional investments in managing the nations forest. As part of the Forest Service grant program to states, each state forestry department was required to show how their programs would interface with the Resource Planning Act program (RPA) developed by the Forest Service.

   Oregon's document had six major sections: timber production; utilization improvements; forest soil and water improvements; program development and management improvement; forest pest management; and cooperative fire protection. The document reviewed the authority and policy, history, current situation and state program, national concerns, goals related to RPA, recommendations for program direction, federal funding, economic analysis, and data sources. The aggregate of theses state documents became the foundation for the Forest Service's budget requests to Congress.

   However, the real significance of this report was not the budget request, but rather that the Forest Service agreed to include a *Forestry Program for Oregon* alternative, as one of several alternatives, in each national forest plans environmental impact statement.

5. ***1982 Forestry Program for Oregon: An Action Program for the Eighties. (Oregon Board of Forestry, 1982).***

   In 1982, the Board updated their 1977 *FPFO u*sing public input and the above documents. Their recommendations revolved around intensive management, inventory regulation, land use planning to protect the commercial forest land base, forest taxation, private forest land management (including service forestry that provided forestry assistance to private landowners), protection from fire, protection from insects and disease, environmental protection, research and education, and resource monitoring and data analysis. Limited financial resources of the Department at this time may have resulted in a final document not as comprehensive as it could have been.

   Like the 1977 document the *1982 FPFO* became the policy framework that the Board and the Department used to represent the state on local, state, and federal forest resource issues.

1990 Forestry Program for Oregon

In 1987, Gail Achterman, Governor Neil Goldschmidt's Natural Resource Advisor, assembled a collaborative mediation team to address several issues important to the forest industry and the environmental community. The ten-member team represented the forest industry, the environmental community, state agencies, and the Governor's Office.

The resulting product was HB 3396 (1987 Legislative Assembly) that had several key features;

- the Board was changed from an 18-member portfolio board to a seven-member citizens board without portfolio.
- the Forest Practices Act was amended "to declare to be public policy of the state of Oregon to encourage economically efficient forest practices that ensured the continuous growing and harvesting of forest tree species and the maintenance of forest land for such purposes as the leasing use on privately owned land, consistent with sound management of soil, air, water, fish and wildlife resources" (scenic was added in 1991).
- amended the Forest Practices Act to give the Board responsibility to protect Oregon's land use planning Goal 5 resources on forest land.
- amended land use laws to prevent counties from regulating forest practices.

A new Board of Forestry was appointed and first met in January, 1988 with Tom Walsh appointed as chair. His belief was that the Board should represent the citizens of Oregon by assuming policy responsibly for all of Oregon's forest lands, irrespective of ownership. The new Board embraced this idea. The jargon phrase for this responsibility was Oregon's "28- million acre forest." To accomplish this goal, the Board embarked on the process of developing a new *FPFO*.

The Board hired Don Barney of Barney and Worth to help organize workshops to gather early public input that led to the formation of the next *FPFO*. Bob Chadwick of Chadwick and Associates was hired to lead the Department's public input activities and statewide attitude survey [Chadwick, 1986].

Factors Chadwick considered were:

- Information from a statewide attitude survey conducted by Moore Information that consisted of a telephone survey of 600 randomly selected Oregonians.
- results of seven facilitated workshops around the state attended by 185 people.
- conducted an interagency meeting with eight state agency representatives.
- Interviews of 17 key public leaders with a broad range of interests.
- comments from a Department staff meeting to obtain agency leadership views on forest issues.
- interviews of 14 Department employees as a sampling of the organization.

In all, Chadwick's study showed that the public saw the Board as the appropriate leader on forest policy in Oregon, and that the emerging issue was to find a balance between the environment and economic while balancing private rights and public values. (Author's note: So what is different today?). A summary of Chadwick's work is found in Attachment 5.

1. ***Assessment of Oregon's Forests. (Lettman, Technical Editor, 1988*).**

   This assessment document set out to achieve a balanced technical assessment of Oregon's 28-million acre forest. Thirty eight authors produced 31 papers. Section 1 looked at Oregon's forest resources; Section 2 looked at Oregon's forest economy; and Section 3 examined selected opportunities. The document was the best available assessment of Oregon's 28-million acre forest and helped the Board develop their next *FPFO.* However, this assessment did reveal how little was known about Oregon's forest resources except for timber. Major forest policies and plans were being crafted using conventional wisdom, which sometimes turned out to be incorrect.

2. ***1990 Forestry Program for Oregon. (Oregon Board of Forestry, 1990).***

   In this document forward, Board Chair Walsh stated "The Board of Forestry is clearly dedicated to overseeing the prosperity of Oregon's forests for all constituencies; not just for the industry, not just for the environmental groups, not just for recreationists, but for all users."

   The document was organized around a mission statement, seven objectives, and policy goals for each of the seven objectives: forest land use; forest practices; timber growth and harvest; recreation, fish and wildlife, grazing and other forest uses; forest protection; and public education. This was a beginning step in having the *FPFO* consider all forest resources, not just timber, and a first step in educating the public to view all of Oregon's forests as one forest, regardless of ownership.

   The document was a comprehensive effort to examine the state's forests as a whole and to provide leadership on forest policy actions to benefit the state and its citizens.

1995 Forestry Program for Oregon

The process for the 1995 *FPFO* was initiated following the passage of SB 1125 by the 1991 Legislative Assembly. This bill required the Department to take action in several areas: update several Forest Practices Act administrative rules, conduct several studies, including the availability of Pacific yew tree species, cumulative effects of forest practices on forest land, and factors affecting fisheries. The cumulative effects analysis and fisheries studies are pertinent to this paper and are discussed below. In addition, the spotted owl and marbled murrelet had been listed as threatened species under the federal Endangered Species Act and federal timber supply had dropped significantly as a result of newly adopted federal forest management plans**.**

1. ***Timber Management Practices and Land Use Trends on Private Forest Land in Oregon: A Final Report to the Sixty-Eighth Oregon Legislative Assembly. (Lettman, 1995).***

   This report evaluated the land use trends including timber growth and harvest in western and eastern Oregon on private forest land and timber management practices. The report found that in western Oregon, timber growth and harvest were in balance, but there was a shift from growing and harvesting larger trees to growing and harvesting smaller trees using shorter rotations. In eastern Oregon, timber supplies were decreasing, owing to salvage of insect and disease infested trees and the liquidation of private timber because of the decline in harvest on federal lands.

2. ***Status and Future of Salmon of Western Oregon and Northern California: Overview of Findings and Option. (Dr. Daniel Botkin, 1995).***

   In 1991, part of Oregon Senate Bill 1125 instructed the Department to conduct a "scientific inquiry on the state of knowledge of anadromous fish runs in western Oregon" that would address the following six charges:

   - identify leading cause, both on-shore and off-shore for anadromous fish populations declines if that is the cause.
   - assign the relative importance of forest practices to these declines, compared to other leading causes.
   - identify the relative importance of various habitat characteristic in streams in limiting anadromous fish production.
   - determine how forest practices have affected fish production, habitat characteristics anadromous fish populations before and since 1972.
   - identify the extent to which forest practices are limiting the recovery of depressed anadromous fish populations.
   - make recommendations as to how forest practices can assist in recovery of anadromous fish populations.

   The Department, through Oregon State University College of Forestry, hired Dr. Daniel Botkin, with the Center for the Study of the Environment, to lead this study. He assembled a team of six other scientists and himself to conduct the study. The study did a good job of addressing the issues outlined above. The Department and the Board considered his work as they modified riparian rules and rewrote the *FPFO*.

3. ***1995 Forestry Program for Oregon. (Oregon Board of Forestry, 1995).***

   The Board and the Department hired facilitators to help collect and help synthesize public input. Oregon forestry leaders were surveyed; a Board-sponsored retreat was held with a wide range of interested parties, and an updated public opinion poll was conducted. The Board held six concurrent, televised town hall meetings using Ed-Net to gather public input on the draft *FPFO.*

From this information, the Board revised their mission, developed vision and value statements, and identified eight objectives. These eight objectives laid out the Board's programs and policies to address their vision and values. This *FPFO* included the first commitment to ecosystem health and sustainability as well as stressing the importance of research, monitoring and adaptive management. In addition, the format and readability of the document set the standard for communicating important information in understandable terms, avoiding bureaucratic detail and research data that had not been interpreted.

2003 Forestry Program for Oregon

In an ongoing effort to keep their forest policies current, the Board and the Department embarked in 2003 on a process to update the *FPFO.* The foundation of the work was the newly developed forest assessment based on collection and analysis of data from the international Montreal Process for the Conservation and Sustainable Management of Temperate and Boreal Forests. (See point 2 below).

1. ***Cumulative Effects of Forest Practices in Oregon: Executive Summary. (Beschta, et al, 1995*).**

   In 1991, the Oregon Legislative Assembly passed SB 1125 that addressed several forest practices issues of growing concern to the forest industry. These included clear-cut size and spacing, reforestation criteria and timelines, and scenic corridors along designated highways. Fisheries management issues also arose during the legislative conversations. Claims were made by some interests that forest practices were having a devastating impact on Coho fish returns.

   Senator Joyce Cohen of Portland became very frustrated with the lack of good information around which to make legislative decisions. She insisted that a section go into the bill that required the Department to evaluate the cumulative effects of forest practices in Oregon. Additionally, the Department was authorized to hire a team of people to look more closely at forestry and fisheries management.

   The Department hired the Oregon State University College of Forestry to evaluate forest practices in Oregon. The project evaluated the cumulative effects from forest practices, including a literature review and synthesis of current knowledge, and a conceptual framework describing the interactions of forest practices which potentially contribute to cumulative effects. The report was a high-level evaluation and thus difficult to translate into operational forestry. In the end, the Department realized it needed data against which to measure forest practices and their effects on other resource values.

2. ***Incentives to Encourage Stewardship Forestry in Oregon. (Forest Incentives Group, 1996)***

   The Board of Forestry appointed the Forest Incentives Group to review forest incentives and regulatory scene in Oregon. The goal was to consider a wide array of incentive

ideas that would address the varied ownership needs of Oregon's forest landowners, recognizing different land ownership sizes and conditions. The Forest Incentives Group used the Board's mission statement for developing the major elements of a health forest:

"**promote healthy diverse forest ecosystems throughout Oregon that provide abundant timber and other forest products, habitats to support health populations of native plants and animals, productive soil, clean air and water, open space and recreational opportunities"**

From the mission statement the Forest Incentive Group developed forest enhancement actions and incentive recommendations for the following elements: Healthy Diverse Forest Ecosystems; Habitat for Native Fish and Wildlife; Abundant Forest Products; clean Air; Clean Water; Recreation and Open Space Opportunities. This report provided ideas for the Board to consider regarding non-regulatory approaches important for achieving sustainable forestry in Oregon.

3. Oregon's First Approximation Report for Forest Sustainability. (Birch, 2000).

The need for a basis to evaluate Oregon's forests lead to the use of the Montreal Process Criteria and Indicators (internationally agreed upon country level inventory points developed as the basis for international sustainable forestry discussions. [See Attachment 3 and http://www.montrealprocess.org/].

The Department formed an advisory committee comprised of state and federal agencies, the College of Forestry, conservation groups, the landowner community and former state senator Joyce Cohen. The purpose of the committee was to attain agreement that the Montreal Process criteria and Indicators were a good basis for evaluating Oregon's forests from a social, economic and environmental perspective. The committee was very valuable in helping the Department assemble the report titled *Oregon's First Approximation Report for Forest Sustainability*. Sixteen authors participated in developing this report. Oregon was the first government entity in the world to complete this evaluation. This report gave the Department and the Board the best comprehensive assessment of Oregon's forest resources to date.

4. Landmark Assessment of Oregon's Forest Sustainability Symposium. (2001).

In October 2001, the Board in partnership, with Oregon State University College of Forestry, hosted a symposium at OSU which drew 500 participants and marked the culmination of ten years of scientific inquiry on the part of the Board, the Department, and other organizations into the status of Oregon's forests.

Governor Kitzhaber provided a major forest policy speech to keynote the symposium. Other speaker's presentations provided summaries of the current state of knowledge on Oregon's forest resource issues, organized around the seven Montreal Process criteria for sustainable forest management. On the following day, an invited panel of policy-

makers and stakeholders participated in a facilitated public forum with Board of Forestry members to discuss in-depth the previous day's presentations and implications for future Board policies and strategic planning.

5. ***Oregon Forest Report 2003. (Oregon Department of Forestry, 2003).***

   This document reported some of the symposium's key findings, offered a snapshot in time of forests and forestry in Oregon, discussed some of the challenges currently facing resource managers, forest owners, and policy makers, and highlighted opportunities to achieve sustainability. Again, this document was organized around the Montreal Process criteria and provided a factual foundation for the 2003 *FPFO*.

6. ***A Forestry Program for Oregon: Oregonians Discuss Their Opinions on Forest Management & Sustainability. (Davis, Hibbitts & McCaig, 2001).***

   The Department, in cooperation with the Oregon Forests Resource Institute, contracted with consultants Davis, Hibbitts, and McCaig to help the Board of Forestry understand public attitudes, values, and beliefs regarding Oregon's forests and sustainable forest management. The consultants' activities included:

   - completing a literature review of public opinions.
   - holding six focus group discussions.
   - conducting two statewide surveys of Oregonians about attitudes toward forest management and sustainability issues.

   Overall, these actions showed that Oregonians held a strong preference for a balanced approach to forest management including social, economic, and environmental benefits. [See attachment 6 for the conclusions and observations from their studies].

7. ***Forestry Program for Oregon. (Oregon Board of Forestry, 2003).***

   In October 2002 the Board held a retreat at Silver Creek Falls Conference Center to consider the information gathered in points 1 to 5 above. Board members solicited comments from the public before the meeting. During the meeting they fine tuned a public review draft of the *2003 FPFO.*

   The draft document was founded on the belief that sustainable forest management must succeed in achieving three goals: sustainable forest management must be economically viable, environmentally responsible, and socially acceptable.

   Three principles were set forth to achieve the Board's vision:

   - the widely recognized international criteria and indicators was to serve as a useful framework for discovering, discussing, and assessing the sustainability of Oregon's forests,

- sustainability requires maintaining a diversity of forest ownerships and management objectives across the landscape and through time.
- cooperative, non-regulatory methods were strongly preferred in achieving public benefits on private lands.

The 2003 edition listed seven strategies (the Montreal Process criteria reworded and reordered to be more meaningful and "owned" by Oregonians) and 55 proposed actions to achieve the Board's mission and vision. The document also proposed possible indicators that could be used to measure progress towards achieving these strategies and actions.

The draft *2003 FPFO* was produced for public review and comment during the first half of 2003. Six public forums were held around the state, with at least one Board member present at each forum to introduce the draft document and invite comments. Written public comments were also solicited. Further revisions to the document were made before final adoption in September 2003. Copies of the printed *2003 FPFO* were provided legislators, other natural resource agencies, and key stakeholders. Copies of the full document were also made available to the general public, along with online access to both "pdf" and "html" format editions. A summary *FPFO* "pocket guide" listing the Board's statements of mission, vision, values, strategies, and actions was also printed and distributed.

However, for some, the *2003 FPFO* was challenging for the public to understand and it failed to effectively explain complex issues. A much compressed document directed for broad public consumption would have been a more effective communication with supplemental volumes prepare for staff and specific audiences.

8. Oregon Department of Forestry Strategic Plan 2004-2011. (Oregon Department of Forestry, 2003).

Shortly after adoption of the 2003 *FPFO,* the Department's Forest Resources Planning Program staff led a committee of department program and area representatives in the development of a companion Department Strategic Plan that would cover the same eight-year time period. See:
http://www.oregon.gov/ODF/STATE_FORESTS/FRP/docs/ASP.pdf

The agency strategic plan described the Department's mission, vision, values, core business functions, and performance measures. The strategic plan also described department program activities that would be undertaken to meet statutory responsibilities and to support the Board's *2003 FPFO* strategies and actions. Finally, the document also provided a process for updating the agency strategic plan in coordination with future *FPFO* updates. Ultimately, this strategic plan was not used much and it was almost immediately overshadowed by the new Board decision system and work planning process.

9. ***National Roundtable on Sustainable Forests.***

   Throughout the 2000s, the Forest Resources Planning Program represented the Board's work to promote sustainable forest management in Oregon in the national Roundtable on Sustainable Forests. The roundtable was an open and inclusive process committed to the goal of sustainable forest management on public and private lands in the United States. Roundtable participants included public and private organizations and individuals committed to better decision-making through shared learning and increased understanding. See: http://www.sustainableforests.net/index.php

10. ***United States National Report on Sustainable Forests. (2003).***

    The publication of the *2003 FPFO* coincided with the publication of the first United States National Reports on Sustainable Forest in 2003 See report below, pages 1-32: http://www.fs.fed.us/research/sustain/docs/national-reports/2003/2003-sustainability-report.pdf

    The two reports were linked by common use of the Montreal Process criteria as organizing themes. Concurrent with 11 other Montreal Process country reports, the US report summarized the nation's forest resource conditions and trend using the 67 common indicators agreed to Montreal Process member nations.

    Oregon quickly became recognized nationally and internationally as a leader in integrating the Montreal Process criteria and indicators into government forest policy. Oregon's work was also specifically recognized in the 2010 US National Report on Sustainable Forests. See also:
    http://www.fs.fed.us/research/sustain/docs/national-reports/2010/2010-sustainability-report.pdf
    ftp://ftp.fao.org/docrep/fao/011/k4147e/k4147e.pdf Pages 7-9 and
    http://sfp.cas.psu.edu/pdfs/PerspectivesOnAmericasForests.pdf Pages 31-40

2011 Forestry Program for Oregon

In 2004, the Board began a review and revision of its planning, decision-making, and documentation processes. Objectives of the review were to better integrate and make more transparent its strategic planning, budgeting, legislative concept development, performance measurement, and Board meeting agenda development processes. This action resulted in development of Board work plans to map out the processes that would be used to lead to Board decisions on the highest priority issues it was facing.

In 2005, the Board approved an implementation work plan for updating the *FPFO on an eight-year cycle.* In April 2009 the Board affirmed its intent to update the *FPFO* and to maintain the sustainable forest management framework used in the 2003 edition. The Board also endorsed a stronger strategic planning process linking the *FPFO* with the Oregon Indicators of Sustainable Forest Management (see point 1 below), the Board's biennial issues scan, Board work plans, and the work of the Department directly related to Board strategic planning.

At this time there was a major shift in what any assessment should emphasize. The shift was away from timber supply as the key element of forestry sustainability to keeping forest land in forest uses. Retaining the forest land base is key to having all the forest resource values. The land use studies were essential to successfully populating the Board's indicators of forestry, for use in Oregon Benchmarks, and much more. The Board set a target of not losing any more wildland forest.

1. ***Oregon Indicators of Sustainable Forest Management. (2007).***

   In 2005, the Department formed a 20-person ad hoc committee who, in consultation with technical experts, were chartered to develop and recommend to the Board a set of Oregon sustainable forest management indicators. The group met several times from 2005 to 2007. The Board endorsed the indicator advisory committee's technical report in 2007. See: http://www.oregon.gov/odf/resource_planning/docs/oregon_indicators_of_sfm_final.pdf

   The 2007-2009 Oregon Forests Report, produced by the Department summarized the 19 new Oregon indicators in a format easier to read. See: http://www.oregon.gov/odf/pubs/docs/oregon_forests_reports/ofr_2007.pdf

   The framework for the organizing the indicators was the same as the strategies of the *2003 FPFO*. The Board also issued a statement of intent for use of the indicators. They were intended to address all Oregon public and private forestlands, and belong to all Oregonians - regardless of their values and perspectives--not just for use by the Board. The development of sustainable forest management indicators was an important step in implementation of the *2003 FPFO.*

   Once in place, it was envisioned that the indicators would help Oregonians reach consensus on what sustainable forestry means and how to quantify progress towards that goal. The indicators had the potential to guide Oregonians towards forest management policies for public and private forests that were less polarizing and more politically sustainable than the state had experienced the past 30 years. They were intended to provide the Board of Forestry, its partners and cooperators, Oregon citizens, and potential purchasers of Oregon forest products with a comprehensive but manageable set of measurable parameters to assist them in understanding Oregon's forest conditions and trends. In addition, Oregon indicators of sustainable forest management were to:

   - Help to shape social understanding of forests and the forces that influence them.
   - Place natural resource management on par with economic indicators that leaders and the public will understand.
   - Provide a framework to coordinate natural resource inventory, assessment, planning, and research.

- Provide citizens interested in forests with a tool to encourage society to address the needs of forests.

The framework used for the indicators were: social and economic benefits; carbon storage; soil and water; ecosystem health; productive capacity; diverse plant and animal population and habitats; and legal/institutional economic framework. This document help the Board frame their discussion about the next *FPFO.*

2. ***Achieving Oregon's Vision for Federal Forestlands. (Oregon Board of Forestry, 2009).***

At the request of Governor Kulongoski, the Board convened a 15-person advisory committee to help develop a position on management of federal forest lands in Oregon. The Governor's interest was best captured by the following quote, found in the report of the committee: "Ensuring sustainable forest in Oregon requires that we understand that the social, environmental and economic benefits of forest are not only important—but also interconnected…We have to get past this costly conflict over our forests and craft the public policy model that is described in the *Forestry Program for Oregon."*

The report outlined a vision for Oregon's Federal Forest, and four goals to achieve the vision: environment; social; economic; and process.

3. ***Oregon's Statewide Forest Assessment and Resource Strategy. (Oregon Department of Forestry, 2010).***

Under the 2008 amendment to the federal Cooperative Forestry Assistance Act of 1978, states receiving federal money were required to complete an assessment of their forests and develop strategies for addressing the issues identified. The Department used the Board's *FPFO* goal framework as the basis for the assessment [Attachment 7 is a schematic outline of the assessment]. This document influenced the Department's thinking as it was working with the Board of Forestry to finalize their *2011 FPFO*.

4. ***Oregon Department of Forestry and Oregon Forest Resources Institute Forest Values and Beliefs Survey. (Oregon Department of Forestry, 2010).***

In the spring of 2010, the Department and the Oregon Forest Resources Institute again contracted with Davis, Hibbitts & McCaig for a study regarding Oregonians' forest values and beliefs. This combination of telephone surveys and focus groups built upon and updated the work done in 2003. The survey results were used to develop the draft *2011 FPFO* and were included in the public comment record supporting this document. See: http://www.oregon.gov/odf/pages/board/ofri2010study.aspx.

5. ***Oregon Roundtable on Sustainable Forests. (2009-2011).***

Following Department staff participation in US delegations at two international sustainable forest management forums, it became apparent that two obstacles facing the Board in gaining broader understanding, acceptance, and support for the *2003 FPFO*

were being experienced in other countries. Passionate individuals within governments were championing use of the sustainable forest management framework for discussion and measurement of forest resource issues but they lacked strong institutional support or public awareness.

In response, the Board endorsed a staff recommendation to charter an Oregon Roundtable on Sustainable Forests loosely patterned after the US Roundtable. The Board's objectives for the Roundtable were to:

- Receive briefings on the empirical data used to evaluate Oregon Indicators of sustainable forest management conditions and trends and make collective findings on the reasonableness of those evaluations available to the Board of Forestry and interested parties.
- Advance greater use of the *FPFO.*
- Expand the public dialogue around sustainable forests.
- Provide a forum where organizations and individuals addressing sustainable forests can work together.
- Provide a forum where technical and scientific knowledge can be shared.
- Link with and learn from the efforts of business, governmental and non-profit sustainability initiatives.
- Seek a better understanding of the contributions that each of Oregon's forest estates makes to sustainability of Oregon's forests.
- Promote state and federal government coordination in discussing, implementing, and measuring sustainable forest management.

A companion Oregon Roundtable on Sustainable Forests Declaration of Cooperation was produced that included the signed commitments from the Board and executives representing:

- Oregon Department of Forestry
- OSU College of Forestry
- USDI Bureau of Land Management
- Oregon Department of Environmental Quality
- USDA Forest Service Region 6
- USDA Forest Service Pacific Northwest Research Station

Collectively, the Board and these organizations agreed to cooperate in:

- Maintaining a forum for providing meaningful input into Oregon forest policymaking that brings citizens and organizations together for shared learning

and finding common ground on environmentally, economically, and socially integrated solutions.

- Generating more robust engagement among diverse points of view and experiences and to better reflect and honor the diversity of our society and communities.
- Creating a dynamic social process whereby Oregonians shape an evolving, but enduring vision of what constitutes sustainable forest management and greater public support for the substantial benefits of Oregon's forests.
- Exploring ways to link with and learn from the efforts of local initiatives, other states, countries, and organizations that are actively pursuing sustainability of forests.
- Providing opportunities for pilot projects and case studies associated with forest sustainability.
- Encouraging integrated thinking about how forests and people affect each other.

The Oregon Roundtable on Sustainable Forests met 11 times between 2009 and 2011, spending most of its time receiving data reports on the 19 Oregon Indicators of Sustainable Forest Management. Roundtable participants developed recommendations for rating current conditions and trends for each indicator, critiqued indicator information quality, and provided recommendation for future indicator work. See: http://www.oregon.gov/odf/indicators/pages/roundtable.aspx

6. ***Linkages to Federal Initiatives in Oregon. (2008).***

Between publications of the 2003 and 2011 editions of the *FPFO* and as a result of Oregon Roundtable cooperation, institutional changes within the USDA Forest Service Pacific Northwest Research Station and Region 6 were beginning that incorporated the Forestry Program for Oregon strategies. In its 2008 *Oregon's forest resources, 2001–2005: five-year Forest Inventory and Analysis* report**,** the Research Station for the first time directly related its data reporting to seven Montreal Process criteria and the Oregon Indicators of Sustainable Forest Management. See**:** http://www.fs.fed.us/pnw/publications/gtr765/pnw-gtr765a.pdf Chapter 2

The Mt. Hood National Forest went even further by using the seven strategies in the *2003 FPFO*s to organize its fiscal years 2008 and 2009 annual monitoring reports. See: http://www.fs.usda.gov/Internet/FSE_DOCUMENTS/fsbdev3_036381.pdf and http://www.fs.usda.gov/Internet/FSE_DOCUMENTS/stelprdb5329687.pdf

7. ***Forestry Program for Oregon: A Strategy for Sustaining Oregon's Public and Private Forests. (2011).***

Development of the text for the draft 2011 edition of the *FPFO* was primarily conducted by the Forest Resources Planning staff. It had previously been envisioned that other

department program executives would play lead roles, but pre-occupation with budget crises at the time limited such focus and involvement.

A reduced Department budget also limited the scale of the public involvement process to solicit public comments on the draft. Written comments were solicited through the news media, distribution of notices from ODF, and online processes. During this period, significant turnover in Board membership and Department executive leadership took place.

The *2011 FPFO* relied heavily on the 2003 edition for its foundation. The Board updated its mission, vision, and value statements. The seven 2003 strategies were relabeled as goals, but largely remained unchanged. A new, slightly shorter set of Board objectives were organized beneath these goals, replacing the previous actions. The most significant change was the inclusion of ratings information for the new 19 Oregon indicators of sustainable forest management, based on Oregon Roundtable on Sustainable Forests input. Following further revision based on public comment and Board member input, *2011 FPFO* was adopted in July of 2011.

The 2011 edition completed the vision that began in the late 1990s of instituting and comprehensive sustainable forest management policy framework for discussing and measuring performance on all Oregon public and private forest ownerships. When the framework was originally proposed, the Board had received some criticism from both sides of the ongoing polarized forestry debates. Some in forest industry believed Oregon forests were already being managed sustainably and that the Board should just say so without a need for a new policy framework.

Meanwhile, some in the environmental community feared the new sustainable forest management framework would be used to "greenwash" current forest resources conditions and issues and mask the real problems that existed. The power of the implementation Oregon indicators of sustainable forest management became evident as the data began to be reported and evaluations of that data were made by the Oregon Roundtable. Some indicators were headed in the right direction but others had mixed or negative performance when compared to desired conditions and trends. Perhaps the most important statement by the Board in the *2011 FPFO* put to rest both of those criticisms from a decade earlier and highlighted the value that the framework could play:

> *"Although many Oregon forests are managed following principles of sustainable forestry, Oregonians' own indicators of sustainable forest management provide evidence Oregon's forests, in total, are <u>not</u> currently being managed sustainably.*
>
> *"However, there are solutions. In the 2011 Forestry Program for Oregon, the Board of Forestry has developed a vision, goals, objectives, and indicators to*

address the current challenges and make progress on the pathway to sustainably managing all of Oregon's public and private forests." (2011 FPFO, page 6)

From 2009 until the *FPFO* was adopted by the Board in 2011, the Board and the Department went through an extensive public input and discussion process. The document established the Board's mission, goals, vision, values and objectives for attaining sustainable forest management on all forest lands in the state.

However, while there was agreement that indicators in this report could become extremely useful tools in dealing with the public, attempts to evaluate the status of compliance or accomplishment were not encouraging and could have been left out of the report. In addition, some data include in the report was not current.

Summary

When asked, everyone tends to support sustainable forestry as long as it remains a vague generality. The devil is in the details. A set of well-designed goals, objectives and indicators in the *FPFO* provides a clear, quantifiable picture of what sustainable forest management of all of the state's public and private forests should look like. It also provides the basis for future policy work where indicator data show trends are not going in a desired direction. The end result can be Oregonians working together, using a common set of data and information to address the highest priority issues determined by consensus in order to reach already agreed to goals and objectives.

The *FPFO* provides a new paradigm where collaboration is encouraged where all values are respected and where marginal voices are still heard but no longer dominate. There needs to be a forum where a growing number of citizens are energized to rejoin the conversation and can build more holistic, common-ground solutions that are environmentally, economically, socially, and politically sustainable. That could be a wonderful transformation compared to the last 30 years of forestry debates in this state.

Going forward, the *2011 FPFO* framework now provides the pathway to accomplish that outcome if it is used and strongly promoted by the Board, Department executives and executives with other forest-related agencies and organizations operating in the state.

EPILOGUE

As part of the Pacific Northwest Regional Commission Forest Policy Project, Greg Protasel, Department of Political Science at Oregon State University, looked at forest policy institutions and organizations in the Pacific Northwest. In the Executive Summary of his report he discussed forest policy-making as planning and politics. These words of wisdom are still important today as the Department and Board search for the public interest. The essence of his comments is quoted below:

"…policy can be said to be the result of two basic yet fundamentally different techniques of decision-making. Policy can be thought of as the outcome of a political process. Or policy can be thought of as the decision of a planning system.

Planning relies on intellectual analysis to produce policy decisions that meet the standards of some agreed upon evaluative criterion. The essential prerequisite of planning is thus a consensus of fundamental key values which allows the development of an evaluative criterion by which to gauge the direction and success of policy. This value consensus is perhaps most easily reached among professionals who share a common framework for resolving issues and problems.

Politics unlike planning does not require consensus of values. Indeed, agreement on values may be virtually impossible. Instead, politics relies upon social interaction to produce consensus on policy outcomes. While politics is not based on agreement of fundamental key values, politics does require agreement on the rules and procedures governing the social interaction which produces the policy outcomes. As long as the participants in the political decision-making process perceive the rules of the "policy-making game" to be fair, the policy outcomes will be accepted as legitimate even if they may be somewhat unfavorable for some participants.

That forest policy-makers will have to make tradeoffs between policy-making as planning and policy-making as politics is unavoidable. The basic choice is between production efficiency and political efficiency…" [Protasel. 1980].

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ATTACHMENTS

Attachment 1 ORS 526.016 and .041 describing the general duties of the Board of Forestry and the State Forester, respectively.

Attachment 2 Eric Allen, 1972, editor Medford Mail Tribune editorials titled: "Forest Policy: Fox and Chickens" (Attachment 2A) and "Worrying About Oregon's Forests" (Attachment 2B).

Attachment 3 Montreal Process: Oregon's Role in the Global Effort.

Attachment 4 Carl Newport's Summary of Findings and Conclusions; and Conclusions and Recommendations.

Attachment 5 Executive Summary of Issues Chart Summarizing Bob Chadwick's report.

Attachment 6 Davis, Hibbitts, & McCaig conclusions and observations about Oregonians preferences for a balanced approach to forest management.

Attachment 7 Oregon's Statewide Forest Assessment 2010 schematic diagram.

Attachment 8 Oregon Department of Forestry/Board of Forestry historical planning hierarchy.

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Attachment 1

Board of Forestry and State Forester's Duties

(ORS 526.016 and ORS 526.041)

526.016 General duties; limits; compensation, and expenses; meetings; rules. (1) The State Board of Forestry shall supervise all matters of forest policy and management under the jurisdiction of this state and approve claims for expenses incurred under the statutes administered by the board except as otherwise provided by law. Advisory committees may be appointed by the board to make recommendations concerning any function vested by law in the board. Notwithstanding any other provisions of law, the board shall not supervise or direct the State Forester in matters relating to the geographic scheduling, annual volume and species allocation, appraisals and competitive timber sale techniques used in the sale of forest products from lands managed under the provisions of ORS chapter 530.

(2) The members of the board are entitled to compensation and expenses as provided in ORS 292.495.

(3) The board shall meet on the first Wednesday after the first Monday in January, March, June and September, at places designated by the chairperson of the board or the State Forester. The board may meet at other times and places in this state on the call of the chairperson or the State Forester. A majority of the voting members of the board constitutes a quorum to do business.

(4) In accordance with the applicable provisions of ORS chapter 183, the board shall adopt rules to perform the functions defined by statute. [1965 c.253 §6; 1969 c.314 §62; 1973 c.230 §3; 1983 c.759 §8; 1987 c.919 §8]

526.020 [Amended by 1953 c.68 §19; 1955 c.117 §1; repealed by 1965 c.253 §9 (526.041 enacted in lieu of 526.020)]

526.030 [Amended by 1953 c.23 §2; 1955 c.27 §1; 1961 c.123 §4; 1965 c.253 §11; renumbered 526.046]

526.041 General duties of State Forester; ru1es. The forester, under the general supervision of the State Board of Forestry, shall:

(1) In compliance with ORS chapter 183, promulgate rules consistent with law for the enforcement of the state forest laws relating directly to the protection of forestland and the conservation of forest resources,

(2) Appoint and instruct fire wardens as provided in ORS chapter 477.

(3) Direct the improvement and protection of forestland owned by the State of Oregon.

(4) Collect data relative to forest conditions.

(5) Take action authorized by law to prevent and extinguish forest, brush and grass fires.

(6) Enforce all laws pertaining to forestland and prosecute violations of such laws.

(7) Cooperate with landowners, political subdivisions, private associations and agencies and others in forest protection.

(8) Advise and encourage reforestation.

(9) Publish such information on forestry

(10) Enter into contracts and cooperative agreements pertaining to experiments and research in forestry.

(11) Sell, exchange or otherwise dispose of any real property heretofore or hereafter acquired by the board for administrative purposes and no longer needed.

(12) Coordinate any activities of the State Forestry Department related to a watershed enhancement project approved by the Oregon Watershed Enhancement Board under ORS 541.375 with activities of other cooperating state and federal agencies participating in the project.

(13) Prescribe uniform state standards for certification of wildland fire training courses and educational programs. [1965 c.253 §10 (enacted in lieu of 526.020); 1969 c.249 §2; 1975 c.605 §27; 1987 c.734 §13; 1993 c.415 §5; 1997 c.413 §5; 2003 c.539 §38]

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Eric Allen's Editorial "Forest Policy: Fox and Chickens"

MEDFORD MAIL TRIBUNE

An Independent Newspaper

Robert. W. Ruhl

(Publisher, 1919-1967; Editor, 1919-1958)

Mrs. Mabel W. Ruhl, Publisher — Eric W. Allen Jr., Editor

Gerald T. Latham, General Manager — Earl H. Adams, Managing Editor

Forest Policy: Fox and Chickens

In Oregon, who, or what, supervises "all matters of forest policy and management in this state"?

The answer, of course, is the State Board of Forestry.

And what is the State Board of Forestry?

It is a collection of men selected through a process that is a Legislative monstrosity and an Executive nightmare.

THE LAW setting up the selection procedure guarantees that the State Board of Forestry will be dominated, both in numbers and philosophy, by the forest products industry.

It deprives the "general public" of any representation.

It deprives the Governor — nominally the appointing authority — of any real freedom of choice in who may serve on this important policy-making body.

In a time when "balanced use," "multiple use," and the protection of environmental and ecological values have claimed the attention and support of great numbers of people, the make-up of the State Board of Forestry virtually guarantees that consumptive use will be dominant in its thinking.

The Board has 14 members, but three of them (the Regional U.S. Forester, the state director of the Bureau of Land Management, and the president of the Oregon Forest Protective Association — or their representatives) are advisory only, and have no vote.

The 11 voting members include the dean of the School of Forestry at Oregon State University. Selection of the other 10 voting members, who serve four-year renewable terms, gets complicated.

Three of them must be from northwestern Oregon, two from southwestern Oregon and one from eastern Oregon. All of these six (a voting majority) MUST be "actively and principally engaged in an administrative capacity in the production or manufacture of forest products."

And to limit the Governor even more as to whom he may name to the Board, the nominees MUST be from a list of persons provided by the West Coast Lumbermen's Association, the Industrial Forestry Association, the Western Forest Industries Association, the Western Wood Products Association, the Association of Oregon Industries, and representatives of the pulp and paper industries.

An additional member, the eighth, must be chosen from a list provided by the Association of Oregon Counties.

And the final three members are chosen thus:

One from a list recommended by the Oregon Farm Bureau Federation, the Oregon State Grange or the Oregon Farmers Union;

One from a list provided by the Western Oregon Livestock Association, the Oregon Cattlemen's Association, or the Oregon Woolgrowers Association; and

One from a list provided by the Izaak Walton League, the Oregon Wildlife Federation, or the Oregon State Labor Council, AFL-CIO.

Talk about special interest legislation!

It must be conceded, by and large, that the State Board of Forestry has had members who, insofar as it is possible for fallible humans to do, have had the public interest — rather than their own financial interests — in mind.

But the concept of "the public interest" held by a lumberman, logger, mill owner or cattleman may be a far cry from what "the public interest" means to the rest of the citizenry.

"Conservation" and "wise use" of the forest resource means different things to a logger, a backpacker, a camper, a hunter, or one who takes Sunday drives through the forest because he enjoys its fresh, natural beauty.

It is obvious that maintenance of the forest products industry, Oregon's largest and economically most important, is vital to the state's well-being. But this should not mean turning over public policy on forestry matters to a board dominated by that industry.

IT IS A flagrant case of setting the fox to guard the chickens. That all the chickens have not been eaten up is due more to luck and self-restraint than to ORS526.010, which guarantees that lumbermen will set the state's forest policies.

The Legislature should set a high priority on reviewing and revising this anachronism, and provide, at a minimum, that other aspects of Oregon's economic, recreational and social life should have a voice in setting the policies that govern the way the state's No. 1 natural resource shall be used. — E.A.

Eric Allen's Editorial "Worrying About Oregon's Forests"

MEDFORD MAIL TRIBUNE
An Independent Newspaper
Robert W. Ruhl
(Publisher, 1919-1967; Editor, 1919-1958)
Mrs. Mabel W. Ruhl, Publisher
Eric W. Allen Jr., Editor
Gerald T. Latham, General Manager
Earl H. Adams, Managing Editor

Worrying About Oregon's Forests

Gov. Tom McCall is a natural-born worrier. Often, he worries out loud, and the state's newspapers report his worries widely.

Currently, he is worrying about tax inequities, school finance, land-use planning, industrial development, too many tourists for the state to accommodate, and similar thorny problems.

BETWEEN-TIMES, he may give a worry or two to the preparation of his biennial message to the Legislature, now due in less than five months.

Because Tom McCall has so many things to worry about, it may be rude to suggest something that he hasn't worried about nearly enough. This is the long-range integrity and productivity of the forests in the state, which are the source of income and employment for the state's largest industry.

We have long thought that the Governor should sit down with some professional career foresters — not those in the employ of the forest products industry — and discuss the future of the forests, including those administered by the federal government, those owned by the state, and those owned by the private sector, both the big industrial lumber giants and the small woodlot owners.

There is cause for concern.

For one thing, in considering subjects for his message to the Legislature, the Governor might give thought to the fact that the State Board of Forestry is dominated and controlled by the forest products industry, and only an amendment to the law can change that fact.

When we suggested editorially a few months ago that putting the forest products industry in command of the State Board of Forestry is like setting the foxes to guard the chickens, we were told in no uncertain terms that Oregon has one of the best Forestry Departments in the United States, and that it has leaned over backward to be fair to all forest users, lumbermen and others alike. We were told that the new Forest Practices Act, now in effect, is a measure of the concern the Board feels for the future of Oregon's forests, most productive in the nation.

This may all be true, and probably is. But the fact that the industry-dominated Forestry Board has shown restraint and concern for the public interest in the past is no guarantee that it will continue to do so in the future. The more the demand for timber goes up (as it will), and the less there is to satisfy that demand (as there will be), the more pressures will be exerted for increased harvesting, and for consumptive use as against non-consumptive use.

(The fact that the State Department of Forestry has been distributing industry propaganda, unbeknownst to the Governor until last week, is one symptom of the problem.)

What kind of board is best-equipped to resist these pressures? An industry-dominated one? Or one broadly representative of Oregon's citizenry as a whole?

Where, on the State Board of Forestry are the representatives of campers? Back-packers? Picnickers? Ecologists? Water resources? (Hunters and fishermen now have nominal representation on the board. So do livestock men.)

THE GOVERNOR ought to be free to appoint the best brains and most responsible citizens in the state to set policy for the state's forests, men (and women) who can consider the long-range good of the state as a whole, unblinded by conflicts of interest or special economic concerns.

He is not free to do so today; he may appoint only individuals nominated by special-interest groups, or designated by law.

We wish the Governor would add this to his long list of things to worry about. — E.A.

THE MONTREAL PROCESS:

Oregon's Role in the Global Effort

Cynthia Orlando
ODF Public Information Officer

In its technical reports, correspondence, and public meetings, the Oregon Department of Forestry frequently refers to something called "The Montreal Process." We thought it might interest readers of the Forest Log *to know how the Montreal Process originated, and why its concepts are important to sound stewardship practices in Oregon's forests, and in forests around the world.*

The Oregon Board of Forestry, which has policy oversight over all of Oregon's public and private forestland, is revising its comprehensive policy document, the Forestry Program for Oregon, *around the unifying theme of sustainability and will use the seven Montreal Process sustainability criteria as central goals in the revised document.*

Decades of Change Lead to Earth Summit, Focus World's Attention on Sustainable Forestry

Following the expansive and optimistic attitudes of the 1960s, in the 1970s a series of United Nations conferences were held that brought developing and industrialized nations together. In 1972 the *UN Conference on the Human Environment* fostered discussions on the 'rights' of the human family to a healthy and productive environment.

During the 1980s, decisionmakers and policy setters identified poverty as a major cause and effect of global environmental problems. There developed a growing realization in national governments that it is impossible to separate economic development issues from environment issues, and that it is futile to attempt to deal with environmental problems without addressing world poverty and international inequality.

Amidst this recognition that poverty intensifies pressures on the environment, there arose new discussions for global change. In 1982-83, these concerns led to the establishment of the World Commission on Environment and Development, chaired by Gro Harlem Brundtland, prime minister of Norway. Brundtland was the youngest person and the first woman ever to hold the office of prime minister in Norway.

Charged with nothing less than "a global agenda for change," the commission's findings served notice that the time had come for a marriage of economy and ecology. Its findings were published in 1987.

The commissions recommendations led to the Earth Summit, held in 1992 in Rio de Janeiro, Brazil. It focused world attention on sustainable forest management, seen as a key component of sustainable development. Sustainable development was defined as meeting the needs of today, without hurting the ability of future generations to meet their needs.

The Earth Summit was unprecedented for a United Nations conference, in terms of both its size and the scope of its concerns. The UN sought to help governments rethink economic development and find ways to halt the destruction of irreplaceable natural resources and pollution of the planet. Hundreds of thousands of people from all walks of life were drawn into the Rio process. They persuaded their leaders to go to Rio and join other nations in making the difficult decisions needed to ensure a healthy planet for generations to come.

The summit's message — that nothing less than a

transformation of our attitudes and behavior would bring about the necessary changes — was transmitted by almost 10,000 on-site journalists and heard by millions 'round the world. Again, the message reflected the complexity of the problems facing us: Both poverty as well as excessive consumption by affluent populations place damaging stress on the environment. Governments recognized the need to redirect economic plans and policies to ensure that all economic decisions fully took into account any environmental impact.

The Montreal Process Forms

As a response to the Earth Summit, in 1993 a conference was convened in Montreal, Canada, called the *International Seminar of Experts on Sustainable Development of Boreal and Temperate Forests.* The Montreal session was sponsored by what is now known as the Organization for Security and Cooperation in Europe (OSCE).

At the time, both Canada and the United States were interested in bringing the European and the post-Montreal processes together. However, following the Montreal seminar, the *Ministerial Conference on the Protection of Forests* in Europe elected to work as a region. Canada then took the lead in launching an initiative among non-European countries having boreal and temperate forests. The objective was to encourage development and implementation of internationally agreed-on national-level criteria and indicators for sustainable forest management.

In Geneva in 1994, the Working Group on Criteria and Indicators for the Conservation and Sustainable Management of Temperate and Boreal Forests was formed; this is now known as the "Montreal Process."

Since its inception, the liaison office for the Montreal Process has been hosted by the Canadian Forest Service. The office, located in Ottawa, provides various services including document preparation and distribution, process coordination and various clearinghouse functions.

Goals and Guideposts Defined in Chile

Between June 1994 and February 1995, five meetings took place to pursue development of a comprehensive set of forest sustainability criteria and indicators. At the sixth meeting, held in Santiago, Chile, ten nations endorsed a statement of political commitment known as the "Santiago Declaration." This declaration is a comprehensive set of criteria and indicators for forest conservation and sustainable management.

The criteria developed in Santiago address national-level policy and sustainability, but are not intended to directly assess sustainability at the forest management unit level. They are to be applied and evaluated according to various countries' needs and conditions.

The first six criteria deal with forest conditions, attributes or functions, and the values or benefits associated with the environmental and socio-economic goods and services that forests provide. These have become the goals and guideposts for the Montreal Process.

Primary Goals of the Montreal Process

The Montreal Process established 67 indicators that describe seven criteria or goals necessary for the conservation and sustainable management of temperate and boreal forests (The Montreal Process, 1999).

They are:

- conservation of biological diversity
- maintenance of productive capacity
- forest ecosystem health and vitality
- conservation of soil and water resources
- forests' contribution to global carbon cycles
- socioeconomic benefits
- legal and institutional framework

Twelve Countries in the Working Group

Twelve countries are involved in the Montreal Process Working Group — Argentina, Australia, Canada, Chile, China, Japan, Korea, Mexico, New Zealand, Russia, the United States, and Uruguay.

Together, these countries represent approximately:

- 60 percent of world's forests

- 90 percent of the world's temperate and boreal forests
- 45 percent of world trade in wood and wood products
- 35 percent of the world's population

2000 Meeting held in China

Montreal Process meetings are held annually, usually in the summer or fall, in locations around the world. In November of last year the Working Group on Criteria and Indicators for the Conservation and Sustainable Management of Temperate and Boreal Forests held its 12th meeting in Beijing in the People's Republic of China.

The meeting included 49 participants, including the 12 countries of the Montreal Process; observers from the Ministerial Conference on the Protection of Forests in Europe (MCPFE/Pan-European Forest Process), International Tropical Timber Organization (ITTO), African Timber Organization (ATO), Global Forest Policy Project, World Wide Fund for Nature China, Wetlands International; and representatives from Chinese Academy of Forestry, Beijing Forestry University, The Center of Economic Research and Development of SFA, Lin'an Forestry Bureau of Zhejiang Province, and Fujian Forestry College of Fujian Province.

The meeting welcomed presentations by Chinese forestry experts, including Professor Jiang Youxu, on "Sustainable Management — A Challenge and Opportunity to Forest Construction in China"; Dr. Wenfa Xiao, CAF, on "Development of Criteria and Indicators for Sustainable Forest Management in China"; and Mr. Lu Wenmin, CAF, on "Forestry Certification in China." These presentations provided participants with an excellent overview of current developments in China.

What's Oregon's Role?

The concepts of forest sustainability took on great meaning for State Forester James E. Brown when he attended the XI World Forestry Congress in Antalya, Turkey, in 1997. While there, he attended a dinner hosted by Cote Ivory (Ivory Coast, Africa), and heard the story of how that nation's government responded to the problem of local villagers plundering new forest plantations for fuel wood. In response, the government negotiated an agreement with the village leaders. Under the agreement, the villagers were given fuelwood-gathering rights for personal use and to sell to jobbers in the city, *as long as they tended the forest in a proper way*. The agreement solved both the economic and social needs of the village and the environmental needs of the nation.

This fairly simple model of open dialogue between the community-of-interest and the community-of-place had relevance internationally. Many other examples can be found where it is the community-of-place that actually tends and manages the forests. If somehow the community-of-place becomes disenfranchised, the forests they once tended can deteriorate over time. Without support from the community-of-place, successful implementation of hoped-for environment improvements will likely not succeed.

State Forester Brown returned to Oregon with a new vision of how the Montreal Process Criteria and Indicators could be used to build upon the foundation already established by the Board of Forestry's *Forestry Program for Oregon* mission and vision statements. He immediately began a dialogue with other policymakers on how Oregon could better evaluate whether its forests were meeting society's objectives and being managed for sustainability.

What the Future Holds

The year 2001 is not only the 30th anniversary of the Oregon Forest Practices Act, the first such forest regulatory program in the nation, it also marks the culmination of new Oregon forest policy initiatives that firmly establish the state as a continuing leader in sustainable forestry.

The Oregon Board of Forestry, which has policy oversight over all of Oregon's public and private forestland, is revising its comprehensive policy document, the *Forestry Program for Oregon*, around the unifying theme of sustainability. The board will use the seven Montreal Process sustainability criteria as central goals in the revised document. Results from the forest assessment project will be used to establish measurable policy objectives and an adaptive management loop. The board is also taking steps to shape the dynamics of how forest certification systems are applied on Oregon forestlands.

Members of the Montreal Process

Argentina, located in the southeastern part of South America. The country can be divided into four major physiographic provinces: the Andes to the west (with arid basins, foothills, glacial mountains and the Lake District), the fertile lowland north (with subtropical rainforests), the central Pampas (a flat mix of humid and dry expanses) and Patagonia (a combination of pastoral steppes and glacial regions). Argentina's climate ranges from subtropical in the north to humid and steamy in the center, and cold in the temperate south.

Australia, an island nation located south of Indonesia between the Pacific and Indian oceans. While Australia's forests and woodlands are dominated by eucalyptus, these are very diverse with over 700 species of eucalypti, which support a rich diversity of ecosystems, varied in their floristic composition, structure and fauna.

Canada, north of the United States, is the second largest country in the world with 42 percent of its lands forested. Canada contains 10 percent of the world's forest. Its forest cover varies from grasslands to temperate forests, and is boreal forest and arctic tundra across the north.

Chile lies on the western and southern part of the Southern Cone of America, extending to the Antarctic continent, and including Easter Island to the west. The country's climate range includes deserts, steppes, Mediterranean, rainy moderate warm, rainy maritime, cold steppes, tundra and polar climates. Eight vegetation areas have been identified for the country: desert, high Andean steppe, schlerophyllous brush and forest, deciduous forest, *Lauraceae* forest, Andean patagonian forest, evergreen forest, and peat bogs and patagonian steppe.

China is the third largest country in the world. It is located in northeast Asia with Mongolia on the northern border, and the East and South China seas to the east. Its geography varies from mountains to plains and deserts. The climate varies from sub-arctic in the northeast to tropical in the south.

Japan is a chain of islands located off the eastern edge of the Eurasian Continent. Most of Japan is under the influence of a wet monsoon climate and has four distinct seasons. Boreal, temperate and sub-tropical forests are distributed within the Japan's north-south ranging geography. Planted forests cover 41 percent of the country, while natural forests covered 53 percent in 1995.

Korea is a peninsular country located in Asia neighbored by China, Russia, and Japan. Korea has a temperate climate characterized by hot and humid summer monsoons and by cold and dry continental winter weather. In general, most of Korea's forest is temperate, but semi-tropical forest occurs in the southern part and semi-boreal forests in the northern part of the Korean peninsula.

Mexico is located in southern North America with the United States to the north. Its temperate forests are composed of pure conifer stands, mixed conifer, and hardwood stands. These forests are growing in the mountain regions of the country, in altitude bands ranging from 800 to 3,000 meters above sea level.

New Zealand, a geographically young country comprising two narrow mountainous islands and a number of small offshore islands, is located southeast of Australia in the Pacific Ocean. New Zealand's indigenous forests are located mainly in the mountain lands, particularly on the west coast of the South Island.

Russia is the largest country in the world. Stretching from the borders with Estonia, Latvia, Belarus, Ukraine and Turkey in the west, along borders with Kazakhstan, Mongolia and China, to reach the Pacific Ocean some 6,000 km later. Due to its great size, Russia has varied climates and a varied geography. It is a fairly cold country with northern pine and spruce forests. There are three major rivers that flow through the country as well as small Ural Mountains.

United States lands vary in character from the boreal forests of Alaska, to the temperate forests of most of the continental US, to the tropical forests of Puerto Rico and Hawaii. The vegetation cover varies greatly and is directly related to temperature and annual precipitation levels. Those areas receiving substantial precipitation are predominately forested, while semiarid and arid locations support grasses and shrubs and are often associated with irrigated agriculture and/or rangeland. Forests are widely, though unevenly distributed across the continent. They range from the sparse scrublands of the arid interior West, to the highly productive forests of the South and Pacific Coast. They include pure hardwood and softwood stands as well as mixtures.

Uruguay is located on the east coast of South America and bounded by Brazil to the north, Argentina to the west and the Atlantic Ocean to the east. Natural forests cover 3.3 percent of the national territory and are located on river banks and in hilly areas, wet valleys, parks, palm groves and coastal sandy areas. Different types of vegetation include meadow species, chircales, psammophytes, halophytes, and plants typical of marshy and aquatic environments.

Appendix A

CRITERIA AND INDICATORS FOR THE CONSERVATION AND SUSTAINABLE MANAGEMENT OF TEMPERATE AND BOREAL FORESTS

Criterion 1: Conservation of biological diversity

Ecosystem Diversity

1. Extent of area by forest type relative to total forest area.
2. Extent of area by forest type and by age class or successional stage.
3. Extent of area by forest type in protected area categories as defined by IUCN or other classification systems.
4. Extent of areas by forest type in protected areas defined by age class or successional stage.
5. Fragmentation of forest types.

Species Diversity

6. The number of forest dependent species.
7. The status (rare, threatened, endangered, or extinct) of forest dependent species at risk of not maintaining viable breeding populations, as determined by legislation or scientific assessment.

Genetic Diversity

8. Number of forest dependent species that occupy a small portion of their former range.
9. Population levels of representative species from diverse habitats monitored across their range.

Criterion 2: Maintenance of productive capacity of forest ecosystems

10. Area of forest land and net area of forest land available for timber production.
11. Total growing stock of both merchantable and nonmerchantable tree species on forest land available for timber production.
12. The area and growing stock of plantations of native and exotic species.
13. Annual removal of wood products compared to the volume determined to be sustainable.
14. Annual removal of non-timber forest products (e.g. fur bearers, berries, mushrooms, game), compared to the level of determined to be sustainable.

Criterion 3: Maintenance of forest ecosystem health and vitality

15. Area and percent of forest affected by processes or agents beyond the range of historic variation, e.g. by insects, disease, competition from exotic species, fire, storm, land clearance, permanent flooding, salinisation, and domestic animals.
16. Area and percent of forest land subjected to levels of specific air pollutants (e.g. sulfates, nitrate, ozone) or ultra violet B that may cause negative impacts on the forest ecosystem.
17. Area and percent of forest land with diminished biological components indicative of changes in fundamental ecological processes (e.g. soil, nutrient cycling, seed dispersion, pollination) and/or ecological continuity.

Appendix A

Criterion 4: Conservation and maintenance of soil and water resources

18. Area and percent of forest land with significant soil erosion.
19. Area and percent of forest land managed primarily for protective functions. e.g. watersheds, flood protection, avalanche protection, riparian zones.
20. Percent of stream kilometers in forested catchments in which stream flow and timing has significantly deviated from the historic range of variation.
21. Area and percent of forest land with significantly diminished soil organic matter and/or changes in other soil chemical properties.
22. Area and percent of forest land with significant compaction or change in soil physical properties resulting from human activities.
23. Percent of water bodies in forest areas (e.g. stream kilometers, lake hectares) with significant variance of biological diversity from the historic range of variability.
24. Percent of water bodies in forest areas (e.g. stream kilometers, lake hectares) with significant variation from the historic range of variability in pH, dissolved oxygen, levels of chemicals (electrical conductivity), sedimentation or temperature change.
25. Area and percent of forest land experiencing an accumulation of persistent toxic substances.

Criterion 5: Maintenance of forest contribution to global carbon cycles

26. Total forest ecosystem biomass and carbon pool, and if appropriate, by forest type, age class, and successional stages.
27. Contribution of forest ecosystems to the total global carbon budget, including absorption and release of carbon.
28. Contribution of forest products to the global carbon budget.

Criterion 6: Maintenance and enhancement of long-term multiple socio-economic benefits to meet the needs of societies

Production and consumption

29. Value and volume of wood and wood products production, including value added through downstream processing.
30. Value and quantities of production of non-wood forest products.
31. Supply and consumption of wood and wood products, including consumption per capita.
32. Value of wood and non-wood products production as percentage of GDP.
33. Degree of recycling of forest products.
34. Supply and consumption/use of non-wood products.

Appendix A

Recreation and tourism

35. Area and percent of forest land managed for general recreation and tourism, in relation to the total area of forest land.
36. Number and type of facilities available for general recreation and tourism, in relation to population and forest area.
37. Number of visitor days attributed to recreation and tourism, in relation to population and forest area.

Investment in the forest sector

38. Value of investment, including investment in forest growing, forest health and management, planted forests, wood processing, recreation and tourism.
39. Level of expenditure on research and development, and education.
40. Extension and use of new and improved technology.
41. Rates of return on investment.

Cultural, social and spiritual needs and values

42. Area and percent of forest land managed in relation to the total area of forest land to protect the range of cultural, social and spiritual needs and values.
43. Non-consumptive-use forest values.

Employment and community needs

44. Direct and indirect employment in the forest sector and the forest sector employment as a proportion of total employment.
45. Average wage rates and injury rates in major employment categories within the forest sector.
46. Viability and adaptability to changing economic conditions, of forest dependent communities, including indigenous communities.
47. Area and percent of forest land used for subsistence purposes.

Criterion 7: Legal, institutional and economic framework for forest conservation and sustainable management

Extent to which the legal framework (laws, regulations, guidelines) supports the conservation and sustainable management of forests, including the extent to which it:

48. Clarifies property rights, provides for appropriate land tenure arrangements, recognizes customary and traditional rights of indigenous people, and provides means of resolving property disputes by due process.
49. Provides for periodic forest-related planning, assessment, and policy review that recognizes the range of forest values, including coordination with relevant sectors.
50. Provides opportunities for public participation in public policy and decision making related to forests and public access to information.
51. Encourages best practice codes for forest management.
52. Provides for the management of forests to conserve special environmental, cultural, social and/or scientific values.

Extent to which the institutional framework supports the conservation and sustainable management of forests, including the capacity to:

53. Provide for public involvement activities and public education, awareness and extension programs, and make available forest related information.
54. Undertake and implement periodic forest-related planning, assessment, and policy review including cross-sectoral planning and coordination.
55. Develop and maintain human resource skills across relevant disciplines.
56. Develop and maintain efficient physical infrastructure to facilitate the supply of forest products and services and support forest management.
57. Enforce laws, regulations and guidelines.

Appendix A

Extent to which the economic framework (economic policies and measures) supports the conservation and sustainable management of forests through:

58. Investment and taxation policies and a regulatory environment which recognize the long-term nature of investments and permit the flow of capital in and out of the forest sector in response to market signals, non-market economic valuations, and public policy decisions in order to meet long-term demands for forest products and services.
59. Non-discriminatory trade polices for forest products.

Capacity to measure and monitor changes in the conservation and sustainable management of forests, including:

60. Availability and extent of up-to-date data, statistics and other information important to measuring or describing indicators associated with criteria 1-7.
61. Scope, frequency and statistical reliability of forest inventories, assessments, monitoring and other relevant information.
62. Compatibility with other countries in measuring, monitoring and reporting on indicators.

Capacity to conduct and apply research and development aimed at improving forest management and delivery of forest goods and services, including:

63. Development of scientific understanding of forest ecosystem characteristics and functions.
64. Development of methodologies to measure and integrate environmental and social costs and benefits into markets and public policies, and to reflect forest related resource depletion or replenishment in national accounting systems.
65. New technologies and the capacity to assess the socioeconomic consequences associated with the introduction of new technologies.
66. Enhancement of ability to predict impacts of human intervention on forests.
67. Ability to predict impacts on forests of possible climate change.

MONTREAL PROCESS CRITERIA AND EXAMPLE INDICATORS FOR SUSTAINABLE FOREST MANAGEMENT
SUSTAINABLE FOREST MANAGEMENT
Biological Diversity
Genetic Diversity
Species Diversity
Ecosystem Diversity
Productive Capacity
Growing Stock
Harvest Vs. Sustainable
Available Forestland
Ecosystem Health
Air Pollution
Ecological Processes
Natural Processes
Soil and Water
Water Quality
General Protection
Erosion
Global Carbon Cycles
Carbon Budget
Carbon Pool
Socio-economic Benefits
Production/ Consumption Wood Products
Investment
Employment/ Community Needs
Cultural/ Spiritual Values
Legal/Institutional/ Economic Framework
Monitoring
Legal
Economic
R & D

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AN APPRAISAL

OF

FORESTRY POLICY AND FORESTRY PROGRAM FORMULATION

IN THE

STATE OF OREGON

Prepared For

Oregon State Department of Forestry

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This work was carried out as part of the
Oregon Forest Productivity Study
supported by a grant from
The Pacific Northwest Regional Commission

November, 1975

SUMMARY OF FINDINGS AND CONCLUSIONS

1. The areas of responsibility of the Oregon State Board of Forestry and the Department of Forestry which require the formulation of policies and programs are:

1. protection of private, state, county, municipal and certain federal forest lands from fire, insects and disease,
2. management of state-owned forest lands,
3. nursery production of forest tree seedlings,
4. administration of the Forest Practices Act,
5. technical forestry services for owners of small forest tracts,
6. education of the general public in forestry and conservation,
7. cooperation with other public and private agencies or organizations in carrying out the above responsibilities.

The first two listed above have traditionally received the greatest attention by the Board of Forestry and the Department. These two and the other areas of responsibility have been rather independently administered programs. A broadening and integration of objectives and responsibilities is needed. This need is recognized by the Board and the Department.

The administration of the several forest tax laws in Oregon also involve the Board of Forestry and the State Forester, but primarily the Department of Revenue. These laws contain important broad statements of forest policy. The Department of Revenue activities are limited to the taxation aspects of these laws yet the policies as stated imply the need for additional programs in forestry and/or provide additional support to existing Department of Forestry programs. The above suggestion for broadening and integrating the forestry programs of the Board and Department of Forestry is also based on this fact.

2. Forest policy formulation in Oregon has been a process of slow evolution. The resulting state forestry policies consist of fragmented portions of various State laws relating to forest lands, forest products and forest taxation. Additional extensions of policy are specifically related to the above listed responsibilities and tend to be more procedural statements than policy. Also, some of these policies have been heavily influenced by federal

agencies' policies, particularly through the control exercised over funds under cooperative programs.

The Board of Forestry, as a body and through its committees, does not have authority to establish broad policies but does exercise guidance through involvement with the specific details of the application of the forestry programs under its jurisdiction. Existing forestry policies are spelled out in the laws which assign the areas of responsibility to the Board and the Department of Forestry and Department of Revenue. These need consolidation and elaboration in order to more fully express what appears to be the implications of the existing forestry programs and the will of the people. After such legislative extension of policies there would be a need for the Board and the Department of Forestry to further elaborate and strengthen their policies and objectives.

A more serious need is to formulate an integrated and coordinated forestry program for the State. In addition to requiring greater policy direction from the legislature, this requires much better understanding by the Board and by the Department of the current and prospective forest situation, particularly those aspects relating to their assigned areas of responsibility. And, it should be noted, that these responsibilities are broadening as the Governor, the legislature, other agencies, and the public seek better information and interpretation as a basis for taking positions and developing policies and programs.

Quite logically, these other individuals, groups and agencies turn to the Board and to the Department for assistance. Also the Board and the Department are facing an increasing need to make evaluations of federal forest land management agencies' proposals in order to protect and coordinate with the local and state interests. The Department definitely needs to function more effectively in evaluating the forest resource situation from the standpoint of the State of Oregon.

3. The Oregon Department of Forestry has not been, and is not, adequately staffed to make the necessary evaluations of the forest resource situation. This need has been filled in the past by reliance on outside sources of information and/or on a certain amount of conventional wisdom about the forest situation and about what can and should be done. Although much work has been done by others in forest resource evaluation, very little has been done that provided the kind of interpretation needed for formulating state forestry policies and programs.

Abundant useful basic information exists and is being collected by the State and by others. Although some add-

itional effort is needed in coordinating the existing data collection activities and extending them to some other subjects, the main additional effort needed by the Board and the Department is in the evaluation of existing and forthcoming new information, specifically from the standpoint of its meaning in terms of State forestry program needs and accomplishments.

4. It is recommended that the Department of Forestry should:

a. Take the leadership in establishing a permanent Forest Resource Situation Advisory Committee to the Board of Forestry. This Committee should include a representative from each agency directly responsible for forest resource data collection and/or evaluation activities, including the Department of Forestry itself, the DOR, OCDC, the Water Resources Council, the Oregon Highway Division of the Department of Transportation, both the Forest Survey and National Forest Administration of the Forest Service, BLM, BIA, SCS, industry land-owning associations, non-industrial land-owning associations and Oregon State University.

The purpose of this Committee should be to exchange resource information, to coordinate data collection projects and needs, to advise the Board of Forestry regularly about data availability, and to provide regular brief summaries of the Oregon forest resource situation.

b. Establish a small but highly qualified group of resource analysts within the Department of Forestry to carry out specific resource situation evaluations directed at problems clearly falling within the responsibility of the Board of Forestry and the Department. The activities of this group should not include any direct field data collection, but should rely entirely on other sources, or where special data needs require it, use contracted studies.

c. Participate with the Board of Forestry in developing for legislative consideration a single integrated and fully coordinated set of forest policies for the guidance of the Board, the Department of Forestry and all other involved state agencies.

CONCLUSIONS AND RECOMMENDATIONS

Several conclusions can be drawn from the foregoing review and appraisal of the policies and programs of the Board of Forestry and Department of Forestry. These are as follows:

1. The development of policies and programs for the areas of responsibility of the Board and the Department require a sound and thorough knowledge of the forest resource situation in Oregon. Up to the present time and currently, they have relied primarily on statewide and local studies made by others, on the general knowledge of Board members, on Department information gathered during regular activities, and on "conventional wisdom" about situations. These sources are no longer adequate relative to the importance of the responsibilities and the changing situations.

2. Forest resource evaluation work of others is useful and supportive but not satisfactory for the prospective needs of the Board and Department in policy and program formulation.

3. Forest resource data is essential to resource analysis. Data is now gathered by a number of agencies or groups, including the Department. The Department has access to a large amount of these data. The information is not always in the form desired nor as up-to-date as desired, yet much of it is useful. Precise and timely forest resource data are very costly and often the extra units of detail, accuracy and timeliness do not greatly enhance the results of the analysis. In view of these circumstances the Department should not add data gathering functions but should make an effort to coordinate and assemble what is being done.

4. Existing State legislative forest policies are not fully adequate as a basis for a comprehensive forestry program in Oregon. The problems and opportunities in forest resource development and use for all purposes are becoming increasingly important to the people of Oregon. These require action by the State, even when federal and private forest lands are concerned. Although much of the required action may be interpreted to fall within the existing legal authority of the Board and

Department, the underlying policy guidance is not always clear and complete. Examples of areas needing attention are service forestry, land use planning, federal-state relations, and cooperative functions.

Based on these four conclusions, the following recommendations are made:

Recommendation 1 -- The Department of Forestry should take the leadership in establishing a permanent Forest Resource Situation Advisory Committee to the Board of Forestry. This committee should include a representative from each agency directly responsible for forest resource data collection and/or evaluation activities. Examples of members are suggested in the body of this report.

The purpose of this committee would be to advise the Board of Forestry, and to accomplish this the committee's functions would be:

1. to consolidate information about resource data collection activities and data availability.

2. to coordinate resource data collection and analysis activities where the need for coordination is revealed, such as standard units of measure, conversion factors, etc.

3. to make brief reports regularly to the Board on the forest resource situation and developments, relying on the work being done by the member agencies.

The Department of Forestry would need to provide a chairman of this Forest Resource Situation Advisory Committee. This person would be responsible for planning the activities of the committee, scheduling meetings, making up agenda, summarizing the results of meetings, giving assignments and preparing the brief periodic situation summary reports to the Board.

Recommendation 2 -- The Department of Forestry should establish a small but highly qualified group of resource analysts within the Department to carry out specific resource situation evaluations directed at problems clearly falling within the responsibility of the Board of Forestry and the Department. This group's functions and the abilities needed are based on the definition of what is meant here by resource analysis. A resource analysis consists of identification of existing or potential problems; assembly of data needed;

interpretation of the data in relation to the problem; analysis of alternative courses of action to solve the problem; and recommendations of policy and/or action programs.

For any given forest resource problem, each involved agency, organization, company and individual has somewhat different responsibilities and capabilities for contributing to a solution. The problem must be analyzed relative to those responsibilities and capabilities. This can best be done within the involved agency but it must be done by competent analysts, not by the administrators nor by those carrying out the action programs. This recommendation is based primarily on that fact.

A professional staff of 4 to 8 persons will be needed. The leader should have doctorate level training, preferably in resource economics. One or more members of the staff will need to be assigned to resource data compilation and interpretation relying on all existing sources. There should be no direct field collection of data unless special circumstances arise. In those cases, the work may be done best by contractual services.

In the analytical work it may also be helpful and necessary to use contracted professional services in order to assure the soundest possible results in a reasonable time. In some cases joint analysis with other agencies may be desirable on a cooperative basis.

An important function of this resource analysis group will be critical review of other resource analyses to determine their value for the Department's purposes.

Until such a group is fully staffed, and particularly at this time when the OSU resource study is being made available and when a program of forestry for Oregon is being drafted, it may be necessary to obtain highly qualified outside assistance from OSU or by contract in order to most effectively use the OSU results in promptly formulating policies and programs.

Recommendation 3 -- The Department of Forestry should participate with the Board of Forestry in developing for legislative consideration a single integrated and fully coordinated set of forest policies for the guidance of the Board, the Department of Forestry and all other involved State agencies. As a first step in this process and as a part of the task of drafting a program of forestry, a draft set of forest policies for Board adoption should be prepared. This should be developed from the existing policy found in the laws which establish the Board's and the Department's existing responsibilities. This process will identify and

define any need for additional legislative policy clarification or extension.

Particular areas of concern are policies covering technical forestry services, relations with federal land-managing agency policies and programs, land use planning, Departmental research, and cooperative functions.

Executive Summary of Issues Chart
Summarizing Bob Chadwick's work

12/2/87

EXECUTIVE SUMMARY OF ISSUES CHART 1

THE CORE ISSUES	THE IMPACTED ARENA (ISSUES)	THE EFFECTED OUTCOMES
1. AN EVOLUTION SOCIAL VALUES IS UNDERWAY ----->	14. THE TIMBER INDUSTRY IS EMBATTLED ------->	24. COMPETING USES CAUSE CONTINUING CONFLICTS
2. A DEEP CULTURAL RESPONSE TO FORESTS/TREES	The Impacted Resources:	25. STATE & FEDERAL LAND USE PLANNING: A VEHICLE FOR CONFLICT
3. A HEALTHY ECOSYSTEM APPROACH IS PREFERRED	15. Declining Forest Land Base and Timber Supply	26. THE INABILITY TO MAKE DECISIONS THE WORST OUTCOME!
The Emerging Issues:	16. Restricting Intensive Forestry	
4. A Balance Between the Environment and Economics	The Specific Issues:	
5. Balancing Private Rights/Public Values	17. Preserving Forest Land/Goal 4	
The Specific Issues	18. Forest Land Taxes	
6. The Forest Practices Act and Goal 5	19. Management of Hardwood Forests	
7. The Riparian Zone	20. National Forest Plans	
8. Critical Wildlife Habitat SB 533	21. Agency Budgets	THE STATE NEEDS TO PROVIDE LEADERSHIP BUILDING TOWARD COMMON AGREEMENT
9. 208 Review	22. Smoke Management	
10. Ground Water Initiative	23. Use of Pesticides	
10a. Water Quantity	23a. Increased Productivity NIPF	
11. Cumulative Effects	23b. Indian Treaty Lands	
12. The Forester's Role Has Changed	THE INDUSTRY NEEDS TO ACKNOWLEDGE THE PROBLEM AND SEEK AN APPROPRIATE BALANCE	
13. Forester/Biologist Relationships		
13a. Impacts Recreation/Tourism-Scenic		
13b. Community Stability-Sustained Yield		
13c. Scenic Rivers		
13d. Diversity		

ACKNOWLEDGE THE CHANGE, ASK THE QUESTION: HOW CAN WE COPE AND ADAPT?

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A Forestry Program for Oregon:

Oregonians Discuss Their Opinions on Forest Management & Sustainability

A Quantitative Research Project
November, 2001

Prepared for:
Oregon Department of Forestry

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Introduction

This report is the third and last phase of a project aimed at providing the Oregon Board of Forestry with information on the public's attitudes, values, and beliefs regarding Oregon's forests and sustainable forest management. The Board of Forestry will consider this social information as part of revising their strategic plan, *The Forestry Program for Oregon.*

The report summarizes the results of quantitative research which involved two statewide surveys of Oregonians about their attitudes toward forest management and sustainability issues. One survey used conventional techniques. The other used scaled comparison survey research, a technique which arrayed pairs of sustainable forest management goals to assess Oregonians' relative priorities.

The survey findings build on the phase one literature review of public opinion and the phase two qualitative research which involved six focus group discussions held throughout Oregon. The survey questions asked generally about forest management and sustainability issues, and specifically about federal and private forestlands. Although state forests were not singled out because of the added complexity, the survey results clearly encompass state forest management issues. This executive summary primarily reports total responses; the full report also analyzes notable variations among different areas of the state and other demographic groups.

Summary of Key Findings

1. Oregonians continue to prefer balanced forest management for all forestlands.
2. Oregonians are divided on whether forestlands are being managed properly to meet the environmental, social, and economic needs of present and future generations.
3. Oregonians often do not know what would prove to them a forest is being managed properly; when they have an opinion it is replanting trees and stopping clear-cutting.
4. Water quality and losing forestland to development are at the top of current and future concerns about Oregon's forests.
5. Oregonians across all regions of the state are concerned about family-wage jobs and the natural resources based economies in Oregon's rural communities.
6. Oregonians support active forest fire management.
7. A majority of Oregonians prefer purchasing Oregon wood products and think wood products are a better environmental choice than alternatives.

A closer look at these and other quantitative research findings follows.

State's Direction: Current Problems and Environmental Concerns

A recent statewide survey indicated that two-thirds of Oregonians think the state is moving in the right direction. However, there still are problems facing the state and survey research since September 11 generally indicates issues like education quality and funding, the economy, energy costs, and concern about personal security are more (or as) important as forest management. The ODF survey underscored this overall concern about the state of the economy, especially family-wage jobs and the natural resources based economies in rural communities.

Oregonians are most concerned about water quality protection among a list of ten environmental issues. Forest management was rated and ranked in the middle. A substantial 91% of those surveyed were very or somewhat concerned about water quality protection, compared with 78% for forest management.

Water Quality

Survey respondents were divided on the current state of water quality in Oregon's forests, with 34% saying it is getting worse, 39% saying it is staying the same, and 17% did not know. A majority (52%) of those feeling the quality is getting worse said contamination from human and animal waste and industrial pollution is the most significant cause, while 16% said removing trees that provide shade for streams and rivers, and 15% said contamination from the use of pesticides.

Future Problems Affecting Oregon's Forests

When asked to rank the biggest problems affecting Oregon's forests if Oregon's population doubles over the next 30 years, survey respondents put losing forestland to development at the top (45%) followed by not having enough high quality drinking water (19%) and loss of fish and wildlife habitat (14%).

Local Issues

Local issues of most concern validated other survey findings about Oregonians' concerns about water quality and loss of forestland. The issues of greatest concern were water quality, the relationship between the forest industry and environmental groups, losing forestland to development and other uses, and fish and wildlife habitat protection. For all of these issues, 75% or more of all respondents were very or somewhat concerned. And for 13 of the 16 issues presented, over 50% of respondents said they were very or somewhat concerned.

Almost half of all respondents said they were more concerned about water quality compared to five years ago; 43% were more concerned about losing forestland to development and other uses and 40% were more concerned about fish and wildlife habitat protection.

Fire Issues

The survey explored several issues related to forest fires. When asked to suggest forest management techniques to reduce the risk of wildfire, the highest response category was clearing dead wood/underbrush/debris (36%), followed by controlled burning (16%), thinning trees (12%), enforcement of campfire laws (9%); 12% did not know.

Consistent with these responses, a substantial 88% agreed strongly or somewhat that it is sometimes necessary to harvest or thin trees from crowded forests to reduce the risk of wildfire or to improve forest health. Another 83% agreed strongly or somewhat that it is sometimes necessary to use controlled fire on forestland to eliminate excess fuel on the forest floor to reduce the risk of wildfire.

Global Warming

Over two-thirds (69%) of respondents said it is very or somewhat important for Oregon's forests to be managed to collect and store carbon to help reduce global warming. When asked if forest landowners should be paid to adopt management practices that help forests to collect and store carbon, 41% said yes, 30% no, and 29% did not know.

Consumer Behavior

A majority (57%) said they preferred to purchase wood and paper products that come from trees harvested in Oregon, while 29% had no preference and 8% preferred trees harvested in another state or country. 84% felt strongly about their preference for Oregon products. With respect to what to do if consumer demand for paper and wood products cannot be met, respondents favored placing restrictions on consumers to reduce demand (50%) over increasing harvests on federal forestlands (24%) or harvesting trees in other countries (16%).

A majority (53%) felt it was OK for them to use wood products because they were a better environmental choice; 34% felt they should use alternatives and 13% had no preference. When determining which wood product to purchase, Oregonians rated product quality and price as most important. They also were interested in knowing if the product was from a well-managed forest.

Sustainable Forest Management

FORESTLANDS MANAGEMENT

When asked whether federal and private forestlands were being managed properly to meet the environmental, social, and economic needs of both present and future generations, responses were somewhat divided, with respondents slightly more favorable toward private forestland management.

PROOF OF SUSTAINABLE FOREST MANAGEMENT

One-fifth (20%) of respondents did not know what would prove to them that forests in their part of Oregon are being managed properly to meet the environmental, social, and economic needs of both present and future generations. The most-mentioned proof was replant trees after they are cut (19%), followed by stop clear-cutting (13%).

BALANCE FOR FORESTLANDS MANAGEMENT

Responses were nearly the same for both federal and private forests when asked how respondents would want forest managers to weigh three different elements of sustainable forest management. Protecting water quality and wildlife habitat was slightly favored over meeting a wide range of social needs and growing forests for products. These responses confirm Oregonians' overall strong preference for a balanced approach to forest management expressed over many years of research.

PROTECTION EXPECTATIONS AND KNOWLEDGE LEVEL

Two-thirds (67%) of respondents said *private forest landowners* in Oregon should provide the same level of protection to fish and wildlife habitat as *farmers and homeowners*; 22% said they should provide more, and 6% said less.

Over two-thirds of Oregonians agreed that Oregon's private forest landowners should be compensated by the government for providing fish and wildlife habitat if the government requires it. When asked what percentage of a $10 million cost to increase fish and wildlife habitat protection on Oregon's private forestlands should be paid by the public instead of private landowners, the average response was 36%; 18% did not know.

Most Oregonians agreed that public (96%) and private (82%) forests that are harvested must be replanted. Asked whether they agreed that new laws and regulations are resulting in removing timber with much greater protection for the environment, almost three-quarters agreed, while 11% did not know.

CRITERIA FOR FOREST SUSTAINABILITY—SCALED COMPARISONS RESULTS

The Scaled Comparison survey offered an opportunity to validate and elaborate on the conventional survey findings. The technique resulted in an understanding of Oregonians' relative priorities for seven different sustainable forest management objectives. Three objectives ranked in the first tier of priorities: protect soil and water quality, maintain the amount of forestland, and protect forests from serious health threats. The remaining objectives were ranked in the following order: have good laws, government and research, and sound policies; protect plant and animal habitats; maintain and enhance a variety of uses; and contribute to reducing global warming.

Study Phases One and Two

Generally, the survey research findings validated and expanded on the earlier two study phases – the literature review and qualitative research involving six focus group discussions in both rural and urban communities throughout the state. The following briefly compares key findings from the three study phases:

BALANCE

Balance in forest management was a dominant theme in the literature review, focus group discussions, and survey research findings.

LOCAL ISSUES

Local issues like replanting and clearcutting were common topics in every focus group, were consistent themes in the literature, and also were important to survey respondents. The role of the forest in Oregon's economy is well documented in the literature. Focus group participants across all groups felt the timber industry was important to the state's economy. Survey respondents also recognized the importance of the industry across all regions of the state.

SUSTAINABLE FORESTRY

While the term "sustainable forestry" was a vague concept to many focus group participants, the concept of a three-legged stool balancing economic, environmental, and social demands resonated with focus group participants. This concept was used to help frame sustainable forestry questions in the statewide surveys. All three study phases underscored the importance Oregonians place on reforestation in sustainable forestry.

ENVIRONMENTAL ISSUES AND FOREST MANAGEMENT

Focus group participants and survey respondents placed a high value on clean water. Overall, and consistent with the literature review, focus group participants related more to "wildlife habitat" than "biological diversity," and the survey research used the terms "wildlife" or "animal" habitat in several questions. Losing forestland to development was at the top of current and future concerns about Oregon's forests in the survey research, a finding consistent with the literature review.

RELATIONSHIPS IN FOREST MANAGEMENT

The focus group research revealed Oregonians' frustration with environmental groups and mistrust of public and private forestland managers. Related to this was the survey research finding that Oregonians are very concerned about the relationship between the forest industry and environmental groups.

Conclusions and Observations

KEY FOREST MANAGEMENT THEMES

Oregonians have a strong preference for balance in forest management. Current and future concerns about Oregon's forests centered on water quality, losing forestland to development, air quality, and fish and wildlife habitat. Oregonians are divided on whether forestlands are being managed properly to meet the environmental, social, and economic needs of present and future generations. Reforestation was a key indicator of sustainable forest management. Oregonians do not hold forest landowners to a higher standard of fish and wildlife habitat protection than farmers and homeowners.

OTHER KEY THEMES

Oregonians support active forest fires management. They believe Oregon's forests should be managed to collect and store carbon to help reduce global warming. They feel strongly about preferring Oregon wood and paper products, and feel wood products are a better environmental choice than alternatives.

GEOGRAPHIC AND OTHER VARIATIONS

There was remarkable similarity in public opinion across all geographic areas of the state and among other demographic subgroups. What was different for some issues was the degree and intensity of opinion. For example, the Central/Eastern Oregon region rated wildfire danger above water quality as the forestland issue of greatest concern, while the other regions put water quality first; and even though all areas were concerned about urban sprawl, it was of more concern in the Portland metro area and of less concern in the South Coast and Eastern Oregon areas compared to the others.

RELATIONSHIP TO STATE FOREST MANAGEMENT

Although survey respondents were not asked specifically about state forest management, the key themes and opinions expressed in both the survey and focus group research apply equally to managing state forests.

TALKING ABOUT FOREST MANAGEMENT AND SUSTAINABILITY ISSUES

The themes that emerged from the research offer solid issues for introducing forest management and sustainability issues. Statewide, these key issues are water and air quality, wildlife habitat protection, and fire management. Communications also can be tailored to issues of more intense interest in different geographic areas.

XI. CONCLUSIONS & OBSERVATIONS

A. Key Forest Management Themes

BALANCE IN FOREST MANAGEMENT

Both the survey and focus group research confirm Oregonians' strong preference for a balanced approach to forest management. This preference for balance cut across all areas of the state. In all regions of the state, there was a slight leaning toward protection of water quality and wildlife habitat, with meeting social needs and growing forest products for use about equal in weight.

An indirect indicator of Oregonians' strong interest in balance was the clear message they sent about their impatience with the relationship between the forest industry and environmental groups. This was the second highest rated concern they had about forestland issues in their local area. The focus groups expressed similar frustrations.

In spite of regional concerns about the natural resources based economy, the strength of support for balanced forest management was indicated by all areas of the state.

CURRENT AND FUTURE CONCERNS ABOUT OREGON'S FORESTS

Water quality and losing forestland to development are at the top of current and future concerns about Oregon's forests. Water quality was a dominant theme throughout both statewide surveys, coming out at or near the top across all geographic and demographic groups. Oregonians' concern for water quality has been a dominant theme of public opinion research for at least the last decade.

Oregonians also are concerned about air quality as a general environmental issue. Water and air quality protection were paired together in the Scaled Comparison research, and that forest management objective was ranked first or second in all regions.

The concern about losing forestland to development (sometimes described as urban sprawl onto forestland) encompassed other concerns like loss of fish and wildlife habitat, not having enough trees to harvest for wood products, and shortage of forest recreation opportunities. Loss of fish and wildlife habitat was among the top rated problems affecting Oregon's forests in the future, and wildlife habitat protection was a top-rated environmental problem and local issue of concern.

FOREST MANAGEMENT ASSESSMENT

Oregonians are divided on whether forestlands are being managed properly to meet the environmental, social, and economic needs of present and future generations, with a somewhat more favorable view toward private versus federal forestland managers. A fairly high percentage did not know how to make the assessment. A plurality disagree that forest management standards should be higher for public than private forestlands.

Reforestation was a key indicator to both survey and focus group participants of sustainable forest management. Given its importance, it is of some concern that Oregonians had less knowledge about replanting requirements on private than on public forestlands. On a related subject, we know from other survey research that the public does not want new laws; it wants existing laws enforced.

Oregonians do not hold forest landowners to a higher standard of fish and wildlife habitat protection than farmers and homeowners. There was support for compensating private forest landowners for providing required fish and wildlife habitat. This view is consistent with the recent passage of Ballot Measure 7 in Oregon. There was soft support for the public helping private landowners to pay for habitat protection.

B. Other Key Themes

Fire Issues

Oregonians support active forest fire management, including controlled fires and harvesting or thinning trees from crowded forests. The focus group discussions revealed some concern about controlled burns, but the survey clearly indicated there is a general understanding of the need for them.

Global Warming

As with the focus groups, the term "global warming" seemed to resonate fairly well with survey respondents. There was strong support for managing Oregon's forest to collect and store carbon to help reduce global warming. And there was some support for paying landowners to adopt management practices that help forests to collect and store carbon (although 29% did not have an opinion indicating this was a new topic for many respondents).

Given Oregonians' concern about air pollution, these results may not be all that surprising. Further, because there has been little prior survey research done on this topic, the results may be of particular value.

Consumer Behavior

Oregonians felt strongly about preferring Oregon wood and paper products. This is consistent with overall importance Oregonians place on our natural resources based economy, expressed in both the survey and focus group research.

A majority felt wood products are a better environmental choice than alternatives, with nearly all feeling strongly about this preference.

Among the 50% who favored placing restrictions on consumers if U.S. consumer demand cannot be met from harvesting trees on U.S. private forestlands in the future, over 90% felt strongly about their preference.

After quality, there is some indication products from well-managed forests make a difference in purchasing decisions.

C. Geographic and Other Variations

There was remarkable similarity in public opinion across all geographic areas of the state and other demographic subgroups, with the degree and intensity varying for different issues.

Water quality protection was rated as the top environmental issue by Oregonians in every area of the state. Water quality also was rated the forestland issue of greatest concern in all regions except for Central/Eastern Oregon, which rated it behind wildfire danger; Southwest and Portland area residents were most concerned overall about water quality compared with other areas. Air quality protection, rated as the second overall environmental issue, was in the top four ratings of concern across all regions of the state.

Over half of all respondents in each region of the state said losing forestland was the most or second most important problem affecting forestland in the face of significant population growth, even though Portland metro residents were most concerned about this issue.

Regarding local issues, wildfire danger was of more concern in Eastern, Central, and Southwest Oregon than in the other areas. Disease or insect damaged trees were of more concern in Eastern Oregon, South Coast, and Southwest areas. Concern about urban sprawl was of more concern in Portland metro, and less concern in the South Coast and Eastern Oregon areas.

Regarding other demographic groups, there were some questions where newer and younger residents had somewhat different views. This generally involved less knowledge about various issues than other residents.

D. Relationship to State Forest Management

As the introduction indicated, survey respondents were not asked specifically about state forest management because Oregonians have historically been able to better distinguish between federal and private forestland. However, the key themes and opinions about local issues expressed in both the survey and focus group research apply equally to managing state forests.

E. Talking about Forest Management and Sustainability Issues

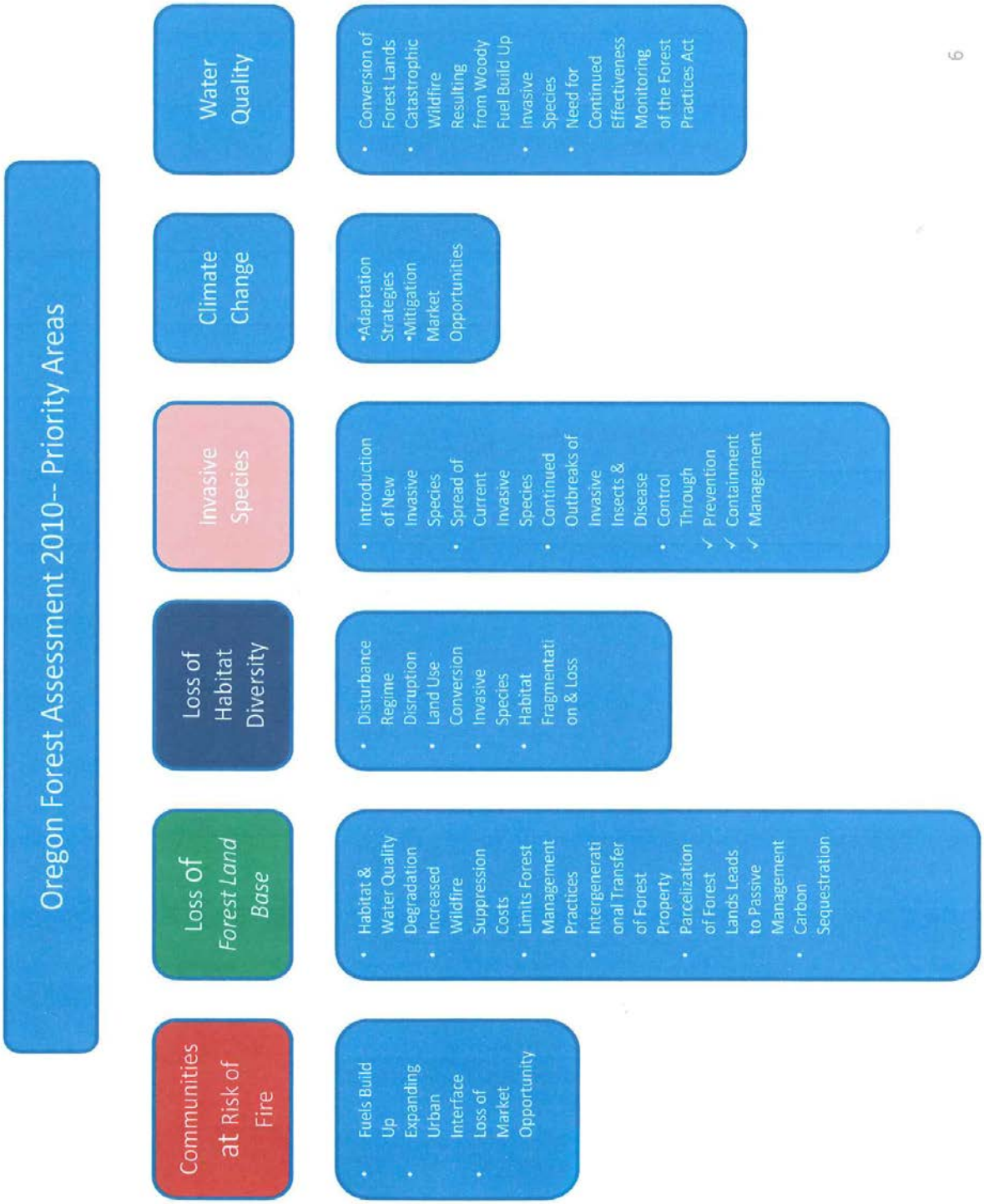
The themes that emerged from the survey and focus group research indicate good, solid pathways for introducing forest management and sustainability issues, rather than presenting as forest management per se. Statewide, these issues are:

- Water and air quality
- Wildlife habitat protection
- Fire management

Forest managers are encouraged to look at the variations in opinion about local issues among different areas of the state for additional messages and entrees to discussing forest management issues.

Ongoing communications are important as newer and younger residents need to be educated on forest management issues. As noted above, there were some questions where these residents had somewhat different views, usually indicating less knowledge about certain issues than other residents.

Oregon Statewide Forest Assessment
2010 Schematic Diagram



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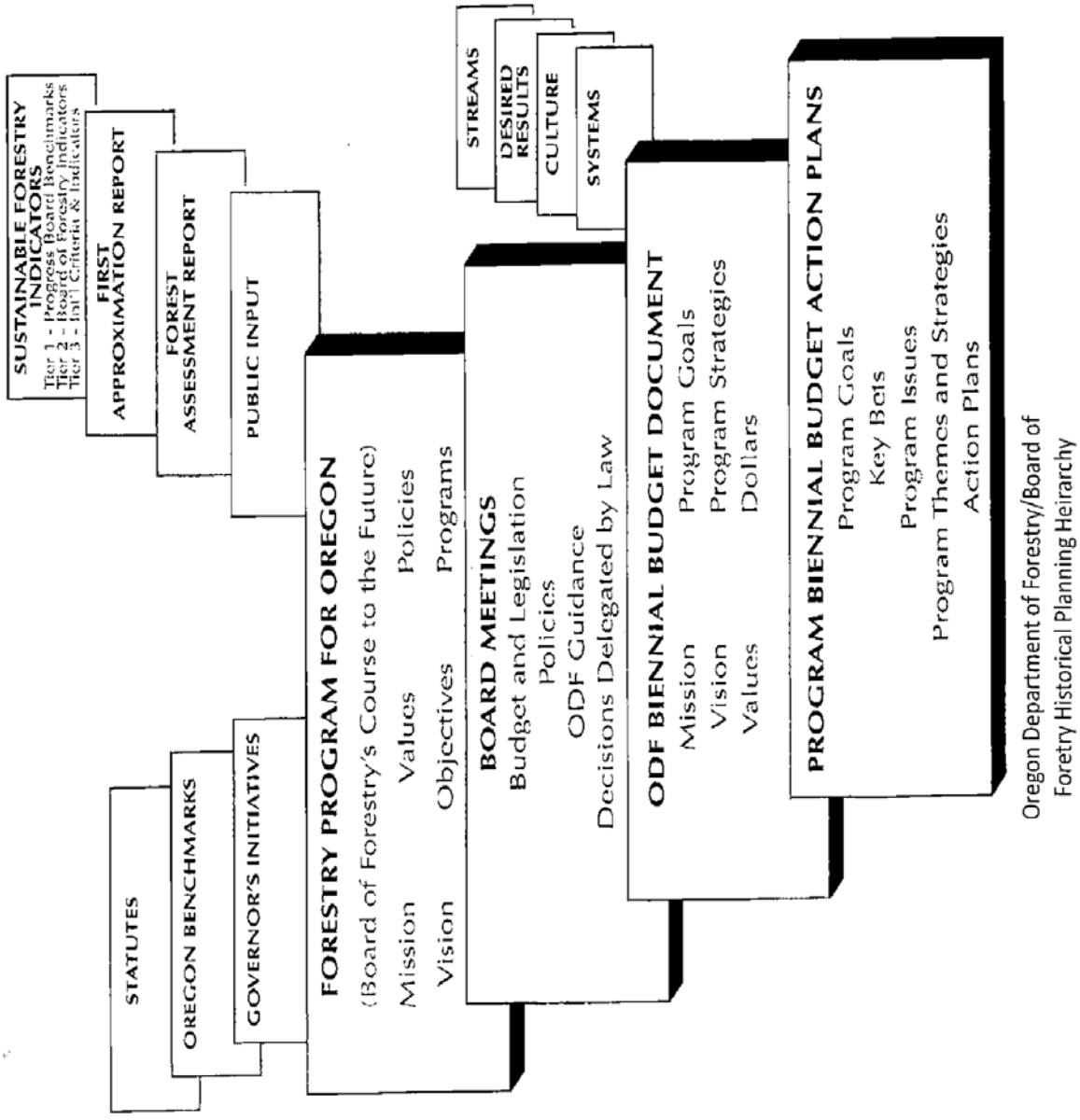
Attachment 8

Oregon Department of Forestry/Board of Forestry
Historical Planning Hierarchy



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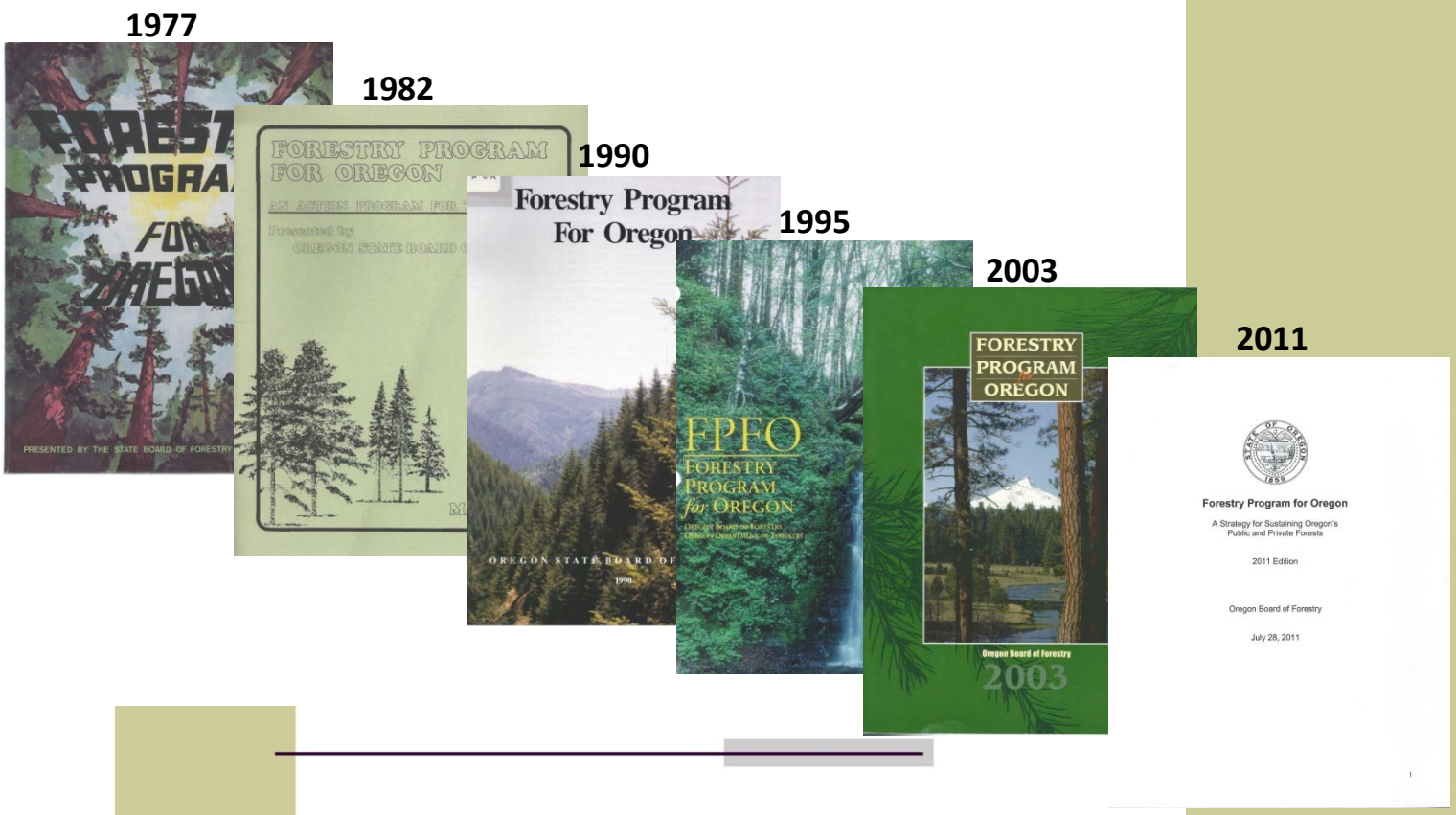

POLICY PATHWAYS TO SUSTAINABLE FORESTRY—A HISTORICAL PERSPECTIVE

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April 2013