



# UPDATING PRIVATE FORESTS MONITORING STRATEGIC PLAN

## CHARTER WORK PLAN

JANUARY 2015

REQUESTOR	SPONSOR(S)	PROJECT MANAGER	START DATE	END DATE
Oregon Department of Forestry	Lena Tucker	Terry Frueh	January 2015	January 2016

### BACKGROUND

The Monitoring Unit of ODF’s Private Forests Division conducts monitoring to assess the effectiveness and implementation of rules promulgated under the Forest Practices Act (FPA) to protect natural resources, and other related programs (e.g., Oregon Plan Voluntary Measures). Historically, the Monitoring Unit’s agenda has been directed by a strategic plan. The strategic plan provides a description of the Unit’s monitoring approach and articulates a list of prioritized monitoring questions. The strategic plan is vital to the Monitoring Unit’s mission because it addresses monitoring questions in a methodical and rational process with understanding, acceptance, and support by stakeholders and decision-makers. Results of monitoring efforts are taken to the Oregon Board of Forestry (Board) as part of its adaptive management approach to forest practices rules. Monitoring results also help guide training efforts, administration of the FPA, and delivery of other related programs. The goals of this strategic plan are to:

- Provide the Board, legislature, and other stakeholders timely, pertinent, and sound information at multiple temporal and spatial scales regarding the effectiveness, implementation and assumptions associated with forest practices rules and best management practices, and outcomes on the ground;
- Coordinate with other monitoring and research efforts to ensure efficient use of state resources and contribute to enterprise, integrated monitoring at the state level;
- Determine if rules, regulations or other programs are being implemented in accordance with expectations and whether they are effective in meeting resource protection goals;
- Address highest priority FPA monitoring questions for the Private Forests Division;
- Work collaboratively with technical experts and stakeholders to produce high quality, transparent monitoring results; and
- Provide technical advice and support to other natural resource agencies engaged in baseline monitoring efforts (e.g., forest and stream conditions).

The Department developed the current strategic plan in 2002 (ODF, 2002). Since 2002, the Monitoring Unit has addressed many of the plan’s priority questions and the Board has completed a new strategic plan, the Forestry Program for Oregon. During discussion on their water quality topic, the Board has discussed interest in future monitoring projects and priorities. The Department is updating the strategic plan to ensure the strategy reflects current needs and priorities.

<b>PROBLEM STATEMENT</b>
An updated strategic plan is needed to guide project prioritization for an effective and efficient monitoring program.
<b>PROJECT DESCRIPTION</b>
This project will develop the Unit’s strategic plan that prioritizes monitoring projects. We will complete this plan by including stakeholders in its development, and by ensuring plan alignment with the Board and Department’s priorities and those of other agencies. In addition, we will develop methods to periodically evaluate this plan and update as appropriate. Finally, similarities, differences, and cross-linkages between implementation and effectiveness monitoring will be clarified.

<b>OBJECTIVES &amp; SUCCESS CRITERIA</b>		
<b>Objectives</b>	<b>Success Criteria</b>	<b>How Measured</b>
High quality, well-prioritized list of monitoring questions.	<ul style="list-style-type: none"> <li>-Creative development of potential priorities in alignment with State, Board and Department’s priorities and those of other agencies.</li> <li>-Rigorous and transparent process for prioritizing them.</li> <li>-Identify, and fill in, gaps in monitoring questions.</li> </ul>	<ul style="list-style-type: none"> <li>-Test questions for alignment with plans and strategies from State, Board, Department and other agencies</li> <li>-Clearly-explained, rigorous, and rational process for prioritizing questions</li> </ul>
Inclusive and transparent process for developing the plan.	<ul style="list-style-type: none"> <li>-Understanding, acceptance, and support from stakeholders.</li> <li>-Documentation of all decisions and input to develop the plan.</li> </ul>	<ul style="list-style-type: none"> <li>-Support by stakeholders when final strategy brought to Board.</li> <li>-Clearly-defined process to include external and internal stakeholders in monitoring projects.</li> <li>-All decisions and input are clearly documented.</li> </ul>

<b>OBJECTIVES &amp; SUCCESS CRITERIA (CONT.)</b>		
Plan integrated with enterprise monitoring efforts.	Clear links established between monitoring strategy and enterprise monitoring efforts	Monitoring priorities cross-linked with enterprise monitoring
Ensure the plan is up to date and we are addressing the correct priorities.	Rational, documentable method to revisit the plan.	Clearly defined process to defend staff time/priorities, while allowing a logical and methodical process for both periodically evaluating and updating the strategy.
Spatial component to prioritization scheme.	Question priorities are geographic-specific.	Each question will indicate priority level for each geographic locale.

<b>PROJECT SCOPE</b>	
<b>In Scope (Will be Included)</b>	<b>Out of Scope (Will not be Included)</b>
<ul style="list-style-type: none"> <li>• Compliance monitoring</li> <li>• Implementation monitoring</li> <li>• Effectiveness monitoring</li> <li>• Assumptions monitoring</li> </ul>	<ul style="list-style-type: none"> <li>• Baseline monitoring</li> <li>• Social monitoring</li> <li>• Forest Health</li> <li>• How to implement the plan</li> </ul>

<b>ASSUMPTIONS &amp; CONSTRAINTS</b>	
<b>Assumptions (Key Bets)</b>	<b>Constraints (Limiting Factors)</b>
Board and Department are committed to effectiveness and implementation monitoring, and using monitoring results as part of adaptive management and guiding where to focus training.	<ul style="list-style-type: none"> <li>• ODF must stay within key Division functions.</li> </ul>

<b>STAKEHOLDERS - PRELIMINARY</b>	
<b>Interested Parties</b>	<b>Why Interested</b>
Landowners: Committee for Family Forestlands, Oregon Forest Industries Council, Oregon Small Woodlands Association, Regional Forest Practices Committees	Affected by findings, partners in monitoring projects
Conservation Community: Oregon Stream Protection Coalition	Environmental concerns
Internal: Field Staff, State Forests	-Play a role in monitoring design & implementation -May have to implement findings
Certification: American Tree Farm System, Forest Stewardship Council, Sustainable Forestry Initiative	-Implementation monitoring supports their efforts

<b>STAKEHOLDERS – PRELIMINARY (CONT.)</b>	
Operators: Associated Oregon Loggers	- Affected by findings
Oregon Forest Resources Institute	- Outreach & education on findings
Tribes of Oregon	- Use findings
Federal Agencies: USDA Forest Service, Natural Resource Conservation Service, Bureau of Land Management, U.S. Geological Survey, National Oceanic and Atmospheric Administration, US Environmental Protection Agency, U.S. Fish and Wildlife Service	-Partners in some monitoring -Use findings
OSU: Forestry Extension, College of Forestry	-Partners in some effectiveness monitoring
State agencies: Department of Environmental Quality, Department of Geology and Mineral Industries, Department of Fish and Wildlife, State Parks and Recreation Department, Columbia River Gorge Commission, Department of State Lands, Oregon Health Authority, Water Resources Department, Department of Agriculture, Oregon Watershed Enhancement Board	-Partners in some monitoring -Board of Forestry required to consult with other agencies (ORS 527.710 (4))
National Council for Air and Stream Improvement.	Partners in some monitoring

<b>RELATED PROJECTS</b>
<ul style="list-style-type: none"> <li>-Forestry Program for Oregon</li> <li>-ODF key performance measures</li> <li>-10 Year Plan for Oregon Project, Healthy Environment Policy Vision</li> <li>-Integrated enterprise monitoring</li> <li>-Key plans and strategies from other agencies</li> </ul>

<b>PRIORITY ASSESSMENT</b>					
Level of Importance:	Scope	Time	Cost	Quality	Risk
<b>Highest</b>	<b>X</b>			<b>X</b>	
<b>Medium</b>		<b>X</b>			
<b>Lowest</b>			<b>X</b>		<b>X</b>

<b>PROJECT TEAM</b>		
<b>Resource Name</b>	<b>Role</b>	<b>Responsibilities</b>
W. Terry Frueh	Project Manager	Project planning & management, communications & outreach
Marganne Allen	Project Oversight	Support Project Manager, communications & outreach as needed
Groom, Olson, Hawksworth, Thompson, Abraham, Clements	Project Support	Provide technical support & review of process
Nick Henneman	Public Affairs	Support Project Manager through press releases and other public outreach

<b>PLAN – TO BE DEVELOPED</b>		
<b>Task</b>	<b>Date Due</b>	<b>Milestone / Deliverable</b>
See Timeline		
<b>Notes/Comments on Plan:</b>		

<b>COMMUNICATION PLAN - GENERAL</b>					
<b>Deliverable/ Description</b>	<b>Target Audience(s)</b>	<b>Delivery Method</b>	<b>Delivery Frequency</b>	<b>Who Responsible?</b>	<b>Purpose</b>
Project Charter Plan	Leadership Team, BOF	Hard Copy	Once	Terry Frueh	Information
Team Meetings	Team Members	As Needed	As Needed	Terry Frueh	Info./Input
Sponsor Meetings	Lena Tucker/Peter Daugherty	In person	Throughout project	Terry Frueh	Input
Project Updates	Advisory committee(s), stakeholders	In person, hard copy, email, etc.	As Needed	Terry Frueh	Info./Input
Stakeholder brainstorming of priorities	Internal and External stakeholders	meeting	Once/group	Frueh, Allen, Project support	Input, develop UAS

<b>GROUP DECISION MAKING PROCESS</b>
Project Manager (Frueh) will make day-to-day decisions with input from support staff. Problem/question resolution, Board/committee preparation in coordination with Marganne Allen. Problem/question on Board/committee preparation with Lena Tucker and Peter Daugherty.