Oregon
Kate Brown, Governor

Department of State Lands
775 Summer Street NE, Suite 100
Salem, OR 97301-1279
(503) 986-5200
FAX (503) 378-4844
www.oregon.gov/dsl

State Land Board

Kate Brown
Governor

Bev Clarno
Secretary of State

Tobias Read
State Treasurer

State Land Board

Regular Meeting
December 10, 2019
Agenda Item 2

SUBJECT

The Elliott State Research Forest exploratory process.

ISSUE

Whether exploration of the Elliott State Research Forest concept should continue.

AUTHORITY

Oregon Constitution, Article VIII, Section 5, specifies that the State Land Board is responsible for managing Common School Fund lands.

ORS 273.041 to 273.071 authorizing the Department of State Lands to exercise the administrative functions of the State Land Board relating to the general powers and duties of Department and Board.

BACKGROUND

In May 2017, the State Land Board voted to keep the Elliott State Forest in public ownership. Under this direction, the Department of State Lands (DSL) began to explore public ownership options that would include development of a successful Habitat Conservation Plan as well as full decoupling of the forest from the Common School Fund.

Potential public owners were asked to come before the Land Board in December 2018 to express their interest in the forest. Following those presentations, the State Land Board directed the Department to work collaboratively with Oregon State University (OSU) to develop a plan for transforming the Elliott State Forest into a research forest.

DSL and OSU in February 2019 entered into a memorandum of understanding (Appendix A) to provide a framework for collaboration in exploring the feasibility of an Elliott State Research Forest. The exploratory process has been guided by the Land Board vision for the forest, as well as Board direction regarding engagement and continued Habitat Conservation Plan (HCP) development.

THE EXPLORATORY PROCESS

Over the past 11 months, DSL and OSU have worked together to explore key elements of a potential Elliott State Research Forest, including:

Working toward the Land Board vision. A successful plan is expected to be consistent with the Land Board vision for the forest, which includes keeping the forest publicly owned with public access; decoupling the forest from the Common School Fund and compensating the fund for the forest; continuing habitat conservation planning to protect species and allow for harvest; and providing for multiple forest benefits, including recreation, education and working forest research.

Meeting expectations for engagement. The Board indicated that engagement with Tribes, local governments, state agencies, key stakeholders and the public is essential to exploration of the research forest concept. In March 2019, the Department convened an Advisory Committee to provide input and insight as a potential research forest concept was explored. The committee, which represents a variety of perspectives on the forest, met ten times in 2019. A committee roster is included as Appendix B, and an outline of the committee work is included as Appendix C.

Tribal governments have been extended the invitation for government-to-government consultation regarding the Elliott State Research Forest Concept, and additionally invited to participate in the Advisory Committee.

Keeping the public informed about the process was a goal throughout. DSL hosted a series of public events to provide information and established a website as a resource for process updates and Advisory Committee materials. OSU has also gathered information regarding a potential research forest through a series of listening sessions and stakeholder conversations. An engagement summary is included as Appendix D.

Drafting a timeline for completion of a Habitat Conservation Plan.

Exploratory Process Outcomes

Through the exploratory work to date:

OSU has drafted a research charter. The research charter structure is included as Appendix E.

OSU, with the input of the Advisory Committee, has developed a set of guiding principles related to forest benefits of recreation, education, local economy, conservation and governance (Appendix F). Each principle provides an overarching statement of guidance for managing the Elliott as a research forest.

The potential research forest concept has been incorporated into ongoing habitat conservation planning. DSL is overseeing development of an HCP that will be consistent with research forest use, and has contracted with ICF, Inc. to develop the HCP. OSU is engaging in and supporting development of the HCP, including contributing technical expertise.

Advisory Committee members have indicated their joint support for continued exploration of the research forest concept.

Much has been accomplished in the past months. But additional work remains, including development of a framework for decoupling and continuation of the habitat conservation planning process. Ongoing engagement with Tribes and stakeholders, as well as the Advisory Committee, continues to be important, as is broader public engagement. Many individuals and groups have expressed interest in a potential research forest plan. Correspondence received is included as Appendix G. Increased public engagement is anticipated in 2020, as part of the research forest exploratory process as well as during the formal habitat conservation planning process.

GUIDANCE FROM THE LAND BOARD ON NEXT STEPS

The Department is now looking to the Land Board to indicate whether the work done thus far reflects the direction provided by the Board, and warrants DSL continuing to work with OSU as their research forest proposal is developed.

APPENDICES

A. Memorandum of Understanding
B. Advisory Committee Roster

C. Outline of Advisory Committee Work
D. Engagement Summary
E. OSU Research Charter Structure
F. OSU Guiding Principles
G. Correspondence Received
H. Land Board Correspondence to Advisory Committee (appendix added 12.10.19)

MEMORANDUM OF UNDERSTANDING

Between
Oregon Department of State Lands
and
Oregon State University

This MOU is between the State of Oregon acting by and through its Oregon Department of State Lands ("Department") and Oregon State University ("University"), each a "Party" and, together, the "Parties", and is effective the date of last signature (the "Effective Date").

I. PURPOSE

The purpose of this MOU is to provide the framework for collaboration between the Parties in investigating and developing a plan outlining the feasibility of converting Elliott State Forest into a research forest (the "Elliott State Research Forest") managed by the University's College of Forestry. It is the shared goal of the University and Department to undertake the work contemplated by this MOU and present the results in the form of a plan to the State Land Board (the "Board") in December 2019.

II. BACKGROUND AND AGREEMENTS

In May 2017, the Board voted to keep Elliott State Forest in public ownership and directed the Department to move forward with a public ownership project for Elliott State Forest. In December 2018, the Board unanimously directed the Department to work with the University to develop a plan for transforming Elliott State Forest into a research forest. Board members also noted the importance of continuing to involve tribes, local governments, other state agencies, and other key stakeholders in development of a plan.

In December 2018, the Board approved a declaration to implement the statute enacted by the Oregon Legislature in 2017 that provides $100 million in bonding to decouple Elliott State Forest from the Common School Fund or compensate the fund for preservation of noneconomic benefits.

The Parties understand that the University is neither capable of nor interested in assuming debt service obligations for $120.8 million (the remainder of the appraised value of Elliott State Forest of $220.8 million after the deduction of the $100 million in bonding). This MOU establishes no obligation to purchase, and by undertaking the work outlined in this MOU the University is not committing to continued participation in Department or Board processes related to Elliott State Forest beyond 2019.

III. ELLIOTT STATE RESEARCH FOREST

The University will exercise good faith efforts to develop a plan in collaboration with the Department for establishing Elliott State Research Forest. The plan will be developed with engagement with the tribes, local governments, other state agencies, and other key stakeholders and be consistent with the direction of the Board to:

- Keep Elliott State Forest publicly owned with public access;
- Decouple Elliott State Forest from the Common School Fund, compensating the school fund for Elliott State Forest and releasing Elliott State Forest from its obligation to generate revenue for schools;
- Continue habitat conservation planning to protect species and allow for harvest; and
- Maintain a working forest that provides local and community benefits (collectively, "Board Vision")

The Parties will examine different mechanisms for structuring ownership and management consistent with the Board Vision. Revenue sources and funding mechanisms will be examined to determine options for accomplishing the necessary decoupling and payment of approximately $120.8 million to the Common School Fund.

The Parties agree that generating timber harvest revenue, sufficient to support the forest and contribute to local economies, will be an important component of the plan. Assessment of timber harvest scenarios in relation to Habitat Conservation Plan (HCP) options and other public values will be accomplished as part of preparing the plan. Additional community partnerships will be investigated through extensive engagement of diverse groups and entities interested in the future of Elliott State Forest.

The plan will:

- Include a timeline for submitting an HCP, a process to continue engaging stakeholders on the range of public benefits the forest provides, including recreation access, conservation, working forest research, and a proposed governance structure for continued representation of public values after decoupling.
- Identify key conservation values collectively using a number of different mechanisms including but not limited to the HCP, a carbon sequestration program, a forest management plan with specified harvest practices that incorporate ecological forestry principles, and potential establishment of funded conservation easements.
- Establish a vision as to how the Elliott State Research Forest can be part of a University research program that can provide critical information to address emerging threats to the management and conservation of forests, and at-risk species in Oregon and beyond. The research program must allow for research at a spatial and temporal scale in order to assess and address emerging threats to forests from changing climate, and on the relationship between active forest stand management and conservation of at-risk species.

IV. PARTNER COMMITMENTS

The Parties will provide support to the efforts described above through the following listed activities. In addition, the Parties will coordinate work efforts, and share plans and updates on progress.

A. Duties of Department

1. Continue to provide custodial management of Elliott State Forest through the Term of this MOU, consistent with potential future use as a research forest.

2. Lead the work with federal listing agencies to frame and complete an HCP for Elliott State Forest pursuant to the federal Endangered Species Act, and consistent with a research forest use.
3. Sponsor and organize a robust process designed to provide transparency for the planning process, and opportunities for stakeholders to provide meaningful input on multiple issues of importance to the process, including the HCP and decoupling of Elliot State Forest from the Common School Fund.
4. Execute an Inter-Governmental Agreement with the University to support reasonable costs associated with University participation in undertaking and completing work under this MOU.

B. Duties of University

1. Provide a draft Elliott State Research Forest Charter characterizing key attributes for a research program that will recognize the importance of healthy, working forests to Oregon's culture, ecosystems, and economy while taking into account the Board Vision.
2. Investigate and identify potential financial and other contributions needed for self-sustaining and sustainable management of the forest consistent with research objectives and the Board Vision.
3. Undertake select outreach to the community and to other stakeholders regarding key management and operational objectives for a research forest, and report back relevant results of that outreach to the Department's stakeholder process.
4. Actively seek, with the support of the Department, tribal engagement to investigate how a research forest might be structured or managed to incorporate and accomplish a vision(s) for the Elliott State Forest held by tribal governments. To the extent feasible, the University will suggest to the Department opportunities for incorporating such a vision in the Elliot State Research Forest Charter.
5. Actively engage in and support the development of the HCP, including contributing technical expertise to reduce conflicts between HCP protocols, potential forest operations/management and using the forest as a research forest.
6. Share draft agreements, including scope of work, for any contracts the University plans to execute in relation to plan development. Provide Department the opportunity to review and comment on draft deliverables produced by consultants related to the plan.

C. Shared Duties of the Department and University

1. The Parties will coordinate and share responsibility for transparent and open communications with the media and public on matters associated with development of the plan. Each will provide the other with notice of any media inquiries or public records requests related to development of the plan. Both will provide the other with a draft of any press release intended for release at least 24 hours prior to release and will consider any comments on the draft press release before issuance.
2. The Parties will coordinate and share all information, data, modeling results, and expertise related to evaluating and developing the financial aspects of the plan.
3. Outreach to shape tribal engagement in planning discussions for the plan is a responsibility shared by both Parties, with the University primarily focused as described above.

4. The Parties will coordinate their investigation of potential legal mechanisms to accomplish decoupling from the Common School Fund including but not limited to potential for land trust transfer. Said coordination, however, is not intended to imply or require waiver of attorney-client privilege available to either the Department or University.

V. ADMINISTRATION

A. Changes to the scope of this MOU shall be made by mutual consent of the Parties, by the issuance of a written modification, signed and dated by all parties, prior to any changes being performed.

B. This MOU is valid through December 31, 2019 (the "Term"). Extensions of the MOU require the signed agreement of each Party.

C. Either Party may immediately terminate the MOU by providing the other Party with written notice at any time before the expiration of the Term.

D. This MOU is not a funds obligation document. Any endeavor to transfer anything of value involving reimbursement or contribution of funds between the parties will be handled through a separate agreement in accordance with applicable laws, regulations, and procedures.

E. Each Party is responsible, to the extent required by law (including the Oregon Tort Claims Act, ORS 30.260-30.300) only for the acts, omissions, or negligence of its own officers, employees or agents.

VI. LIST OF CONTACTS/NOTICES

A. Oregon Department of State Lands
Vicki L. Walker, Director
775 Summer St. NE
Salem, OR 97310
503-986-5200

B. Oregon State University College of Forestry
Geoff Huntington, Director of Strategic Initiatives
109 C Richardson Hall
Corvallis, OR 97331
541-737-9103

VII. SIGNATURES

IN WITNESS WHEREOF, the parties have executed this MOU as of the last date written below.

Sign: Vicki L Walker
Print Name: Vicki L Walker
Title: Director
Department Name: Dept of State Lands
DATE: 2/5/19

Sign:
Name: Michael J. Green
Title: Vice President for Finance and Administration and Chief Financial Officer
University Name: Oregon State University

Elliott
State Forest
Public
Ownership
Project

Elliott State Research Forest Advisory Committee Members

- **Asha Aiello**
  Oregon Outdoor Council
- **Steve Andringa**
  Confederated Tribes of the Coos, Lower Umpqua and Siuslaw Indians
- **Paul Beck**
  Douglas Timber Operators
- **Chris Boice**
  Douglas County
- **Jen Clark**
  Reedsport School District
- **Melissa Cribbins**
  Coos County
- **Eric Farm**
  Barnes & Associates
- **Geoff Huntington**
  Oregon State University
- **Michael Kennedy**
  Confederated Tribes of Siletz Indians
- **Michael Langley**
  Confederated Tribes of Grand Ronde
- **Ken McCall**
  Oregon Hunter's Association
- **Mary Paulson**
  Oregon School Boards Association
- **Bob Sallinger**
  The Audubon Society of Portland
- **Mark Stern**
  The Nature Conservancy
- **Keith Tymchuk**
  Other
- **Bob Van Dyk**
  Wild Salmon Center
- **Vicki Walker**
  Department of State Lands

The Department of State Lands (DSL) convened the Advisory Committee, which represents a variety of perspectives on the forest. The committee process is being managed by Oregon Consensus. Please note: In addition to invited participation in the Advisory Committee process, tribal governments are also invited to engage through government-to-government consultation.

Updated: 11-21-2019

Elliott State Research Forest Advisory Committee
Meeting Sequence

Meeting 1 – April 10, Salem

- Welcome and introductions
- Group purpose, charge, and operating principles
- Introduction to the Elliott State Forest
- Research forest
- HCP intro

Meeting 2 – May 1, Salem

- Public Access & Recreation
- Education opportunities in the forest
- Conservation Values
- Tribal and Cultural Values

Meeting 3 – May 30, Salem

- Timber and Forest Management values
- Local economy and community values
- Revenue and Job Options
    - Timber Harvest and broader Forest Management
    - Non-timber options, including carbon sequestration
    - Common School Fund responsibilities

Meeting 4 – June 25, Reedsport

- HCP refresher and update, including broad overview of aquatic approach
- Broad overview of 2018 rough harvest analysis conducted by OSU using 2008 data
- Emphasis areas and management
- OSU research vision and framework

Meeting 5 – July 30, Roseburg

- Update on draft research charter and vision followed by small group discussion of potential research topics
- Brief presentation on recreation guiding principles
- Preliminary discussion of carbon approach and analysis of market options
- Relationship between the HCP and research activities and overview of terrestrial mapping work

Meeting 6 – August 22, Corvallis

- Tribal Presentations on cultural values and historic connections to the Elliott
- HCP – Discussion of relationship between HCP draft conservation measures in relation to draft OSU Research Charter.
- Modeling scenarios update

Meeting 7 – September 26, Portland

- Overview of draft foundational principles for local economies, recreation, and education
- Draft carbon feasibility report
- Update on modeling scenarios
- Governance considerations and options discussion

Meeting 8- October 24 & 25, Coos Bay

- OSU research design and relationship to proposed HCP
- OSU scenario modeling overview and preliminary results
- Ownership and governance options discussion
- Local economies and conservation guiding principles review
- ESRF tour and site visit to discuss research concepts

Meeting 9 – November 8, Salem

- Review and discussion of guiding principles
- Review and discuss governance considerations
- OSU modeling and research design updates
- Review Financial scenarios and revenue options
- Discuss advisory Committee role going forward

Meeting 10 – November 21st, Corvallis

- Land Board Presentation options
- OSU reflections and message to the Land Board
- Overview and brief discussion of guiding principles, including governance

December 10 - Land Board Presentation

2020 Planning Meeting – January, Salem

- Outcome of Land Board Meeting
- Next steps

Elliott State Research Forest Exploratory process 2019
Public Engagement Events

Public events were held throughout the year for Oregonians to learn more about the exploratory process and to provide input. To date, public informational meetings have been held in the following locations:

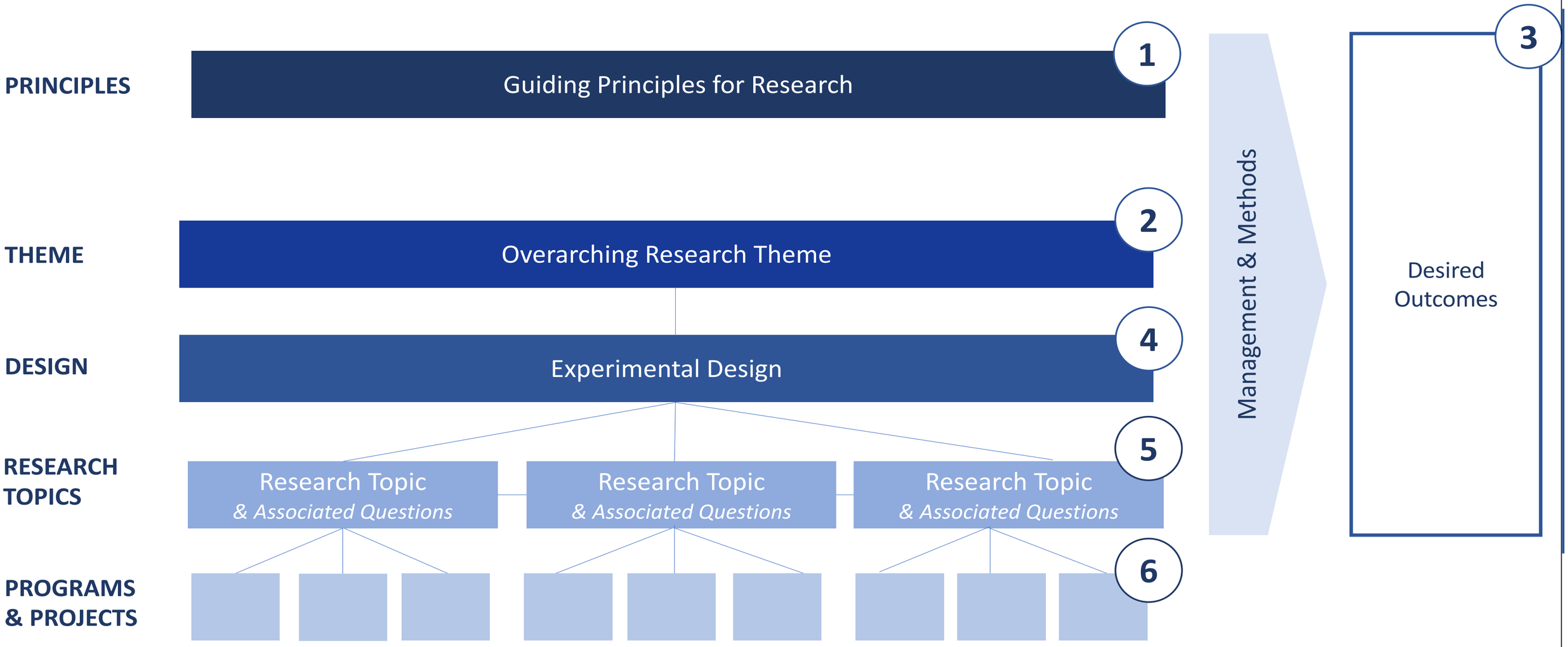
Salem public meeting - May 7
Roseburg public meeting - July 30
Portland public meeting - Sept. 24
Coos Bay public meeting - Oct. 23

Additionally, as a part of the Oregon State University-led exploratory phase to assess the feasibility of transforming the Elliott State Forest into a research forest, the College of Forestry conducted three public listening sessions in the surrounding local communities of North Bend, Reedsport and Roseburg to gather input, ask questions and identify opportunities relating to OSU's process.

North Bend Listening Session- June 4
Reedsport Listening Session- June 5
Roseburg Listening Session- June 6

DSL maintains an Elliott State Forest website at:
https://www.oregon.gov/dsl/Land/Pages/Elliott.aspx

RESEARCH CHARTER DIAGRAM



Oregon State University
College of Forestry

Elliott State Research Forest - Compiled Guiding Principles Working Draft

Each principle is a reflection of stakeholder input synthesized and reconciled to provide overarching statements of suggested direction for management of the Elliott State Research Forest in the context of the primary research mission.

RECREATION

- **Ensure Public Access Into the Future**. The Elliott State Research Forest ("forest") will remain accessible to the public for a variety of uses from multiple established entry points, by both motorized and non-motorized transportation, but not all places at all times.

- **Promote Recreational Access and Use that is Compatible with Research and Ecological Integrity:** Public use of the forest will be supported and managed for different recreational opportunities consistent with a management plan reflecting stakeholder interests and historical activities in concert with public safety, ongoing research, harvest, and conservation of at-risk and historically present species.

- **Support and Promote Diverse Recreational Experiences:** The Elliott State Research Forest recreational program will leverage partnerships within the local community and others to accommodate multiple and diverse recreational uses to provide a range of user experiences within the context of a working forest landscape. Recreational planning will not favor any one recreational type over another but will seek to ensure high-quality experiences on the forest by managing to minimize the potential for conflict between users while safeguarding research and management objectives, and conservation values.

- **Partner with Stakeholders and Manage Locally:** Elliott State Research Forest recreation programs will be managed by local staff who live in the community and work with stakeholders to enhance and protect the identified values of Elliott recreationists.

- **Conduct Research on Sustainable Recreation Practices.** An Elliott State Research Forest recreation program will support relevant research on recreation and eco-based tourism, with the goal to advance scientific knowledge and inform the general public on the opportunities and impacts of balancing multiple interests within forested landscapes.

- **Cultivate Multi-Generational Respect for the Forest.** Utilizing a collaborative approach to partner with schools, organizations, and volunteer groups recreation planning and management will seek to create more opportunities for engagement and a more widely informed forest-user community that is vested in the future of the Elliott State Research Forest.

Each principle is a reflection of stakeholder input synthesized and reconciled to provide overarching statements of suggested direction for management of the Elliott State Research Forest in the context of the primary research mission.

EDUCATIONAL PARTNERSHIPS

- **Seek and Incorporate New Educational Partnerships.** An Elliott State Research Forest will offer opportunities to leverage and integrate existing local and state educational programs and institutions that support and generate forest-based research and knowledge.

- **Expand Accessibility to Forestry Education.** An Elliott State Research Forest will provide and promote a diversity of values, and in doing so will leverage efforts by OSU's College of Forestry to engage students with diverse social, economic, ethnic, and cultural backgrounds in forestry education programs.

- **Serve Students at All Levels of Education Through Programs on the Forest.** OSU will seek to foster and establish a programmatic link with K-12, community colleges, informal collaborative educational initiatives, and educational programs at other universities so that the forest becomes a resource for students at all educational levels.

- **Integrate and Demonstrate Elements of Traditional Knowledge in Educational Programs on the Forest.** Through active partnerships with local Tribal Governments, the Elliott State Research Forest will seek to provide demonstration areas that use traditional forest management practices and focus on Traditional Ecological Knowledge outcomes for use in educational programs.

- **Foster Public Awareness and Understanding of Sustainable Forest Management.** Management and research actions on the Elliott State Research Forest will seek to promote broader understanding and awareness of the role of healthy working forest landscapes to local economies, resilient ecosystems, innovative competitive products, and healthy communities.

- **Develop an Educational Partnerships Plan.** The Elliott State Research Forest will work with stakeholders to develop a plan to foster and implement educational partnerships consistent with the foregoing principles and will implement it pending available resources.

Each principle is a reflection of stakeholder input synthesized and reconciled to provide overarching statements of suggested direction for management of the Elliott State Research Forest in the context of the primary research mission.

LOCAL AND REGIONAL ECONOMIES

- **Operate as a Working Forest While Managing for Research.** The Elliott State Research Forest will be owned and managed as a working forest that produces wood supply as a by-product of research, consistent with the mission of the Institute for Working Forests Landscapes at Oregon State University College of Forestry.

- **Be Financially Self-Sustaining.** The financial model of the forest should incorporate traditional and innovative options for generating revenue to support forest management, and research programs without requiring continued funding support from outside sources.

- **Generate Consistent and High-Quality Timber Harvest**. A sustainable supply of wood volume will be produced over time as a by-product of the research program on the Elliott State Research Forest. Quality should be prioritized over the quantity of harvest.

- **Support Employment Opportunities for Local Communities.** The Elliott State Research Forest should not be managed from a remote location. Management and operation of the forest should be located in proximity to the forest and promote local partnerships that provide opportunities to local businesses and residents of Coos and Douglas counties.

- **Study and report on the Relationship between the Research Forest and Local Economies.** The connections between OSU, the Elliott State Research Forest, and local economies should be documented and reported with transparency over time.

Each principle is a reflection of stakeholder input synthesized and reconciled to provide overarching statements of suggested direction for management of the Elliott State Research Forest in the context of the primary research mission.

CONSERVATION

- **Improve Conservation Status of At-Risk Species.** The Elliott State Research Forest will undertake studies, research, and associated forest management activities that seek to improve the conservation status of at-risk species and the ecosystems upon which they depend.

- **Implement Science-Based Conservation Efforts to Enhance the Productivity and Conservation Values of the Research Forest**. In adhering to the academic mission of Oregon State University, and to ensure the sustainability of any management or activity that occurs on the landscape, all conservation decisions or proposed projects on the Elliott State Research Forest will be rooted in the best available scientific data.

- **Manage for Multiple Conservation Values to Maintain and Enhance Essential Elements of a Forest Ecosystem.** With a holistic, ecological approach, management of the Elliott State Research Forest will support the protection and enhancement of at-risk species and preservation of biodiversity, along with promoting improved natural hydrologic function and opportunities of carbon sequestration.

- **Preserve and Proactively Steward a Diversity of Forest Structures**. Management of the Elliott State Research Forest will emphasize key ecological areas ranging from early seral to late-successional forest structure in the context of the greater landscape. The future growth of the forest should encompass diverse objectives of biological quality and resilience for future adaptability.

- **Collaborate with Local Partners for Monitoring and Restoration of Habitat.** Management planning for the Elliott State Research Forest will partner with local conservation stakeholders to maintain transparency and mutual trust that protection of sensitive natural values will be prioritized.

- **Management Decisions Will Not Be Driven by Potential Financial Returns.** The integrity of the research objectives and conservation values on the Elliott State Research Forest will not be compromised by the presence of active management and economic influences on the forest.

- **Conduct Innovative Research on the Intersection of Forest Ecosystems Functions and Climate Change.** The Elliott State Research Forest will provide a unique opportunity to conduct innovative research on the role that native, mature, and managed forests can play in ameliorating the impacts of climate change for sensitive species, water quality/retention, and carbon sequestration.

Each principle is a reflection of stakeholder input synthesized and reconciled to provide overarching statements of suggested direction for management of the Elliott State Research Forest in the context of the primary research mission.

FOREST OPERATIONS GOVERNANCE

- **Accountability.** The history and unique public nature of the Elliott Forest requires placing a premium on establishing a governance structure that will provide clear lines of accountability for forest management decisions that support research programs and articulated public values into the future. This structure should include formal and informal mechanisms that ensure commitments and principles are honored in the context of fiscal and operational management of the forest over time.

- **Transparency.** Management of the Elliott Forest requires a commitment to transparent operations and decision making that will maintain and enhance public support for the research forest over time. This includes clear and defined processes for governance and oversight, clearly defined pathways for public inquiry and input, and accessible information related to forest operations.

- **Representation.** An Elliott State Research Forest governance structure should engage and incorporate multiple interests and partnerships that reflect key public values the forest will represent over time. Representation of these values in governance of the forest should be balanced, accountable, and transparent with regard to fiscal and operational management of the forest to support research programs over time.

- **Decision Making.** Regardless of governance structure, decision-making processes directing the fiscal and operational management of the Elliott State Research Forest must be accountable, transparent, and open to input while also empowered to operate the forest efficiently and effectively to meet identified objectives.

Elliott State Forest Correspondence

Throughout the exploratory process, many individuals and organizations corresponded with the Department of State Lands regarding a potential Elliott State Research Forest. The Elliott State Research Forest Advisory Committee also received correspondence.

Correspondence received by the Department and the Committee is included in this appendix.

Email Correspondence

The Department received 300 emails containing the following statements:

Dear Rules Coordinator, Dear members of the Oregon State Land Board,

I am writing today to express my concern regarding transferring the Elliott State Forest--Oregon's only old-growth state forest--to Oregon State University (OSU) to be managed as a "research forest". OSU's recent scandal over the clearcutting of old-growth, including trees over 400 years old, on the McDonald-Dunn Research Forest calls into question how the Land Board and the public can trust the institution to protect the Elliott.

OSU has a long and troubling relationship with logging corporations. OSU leaders have sought to censor research by graduate students when it contradicted logging industry positions, have promoted clearcutting and the use of toxic herbicides and pesticides, and have ignored their own conservation plans for OSU-managed lands in approving and carrying out clearcut logging projects.

Given OSU's recent actions in clear-cutting old-growth on the McDonald-Dunn in violation of their own conservation plan, I urge the Land Board to:

1) Suspend any consideration of giving the Elliott to OSU as a "research forest" until OSU adopts permanent protections for old-growth on lands it already manages.

2) Require that any future management plan for the Elliott prioritize carbon storage, including the possible sale of carbon credits, over logging.

3) If OSU is given further consideration as a manager for the Elliott State Forest, they must be required to have a firewall between the university's budget and revenue from logging. OSU administrators shouldn't be allowed to use money from Elliott logging as a slush fund for budget overruns and pet projects.

4) The Elliott is public land, and the Land Board should consider a range of options for protecting this forest, including maintaining it as a state forest or state park--not simply giving it to OSU to be "research-logged" like the old-growth in the McDonald-Dunn.

Members of the Land Board, Oregonians are counting on you to protect our public lands in the Elliott State Forest. We want our old-growth, wild salmon, and wildlife preserved as a legacy for future generations, and the carbon-capturing trees allowed to live on and aid us in the fight against climate change. You should be just as troubled by OSU's clearcutting of 400-year-old trees on "research forest" as I am, and you should stop the rush to give away the Elliott.

Multiple people added additional information to the above statement, including:

- I disagree with transferring the Elliott State Forest to Oregon State University (OSU) to be managed as a "research forest". OSU's recent scandal over the clearcutting of old-growth, including trees over 400 years old, on the McDonald-Dunn Research Forest calls into question how the Land Board and the public can trust the institution to protect the Elliott.

- I am so angry about this as a citizen. Do what's right for the environment for a change.
- I am disappointed in both the state and in Oregon State University in their support of the timber industry over other interest groups including conservation, especially on our public lands. Oregon is the only Western state to have such lax restrictions on logging clear cuts, and pesticide and herbicide use which puts our public and private lands at risk and which poisons our clean air, clean water, and imperils the fishing and outdoor recreation industries. State leaders on both sides of the aisle take more money from timber companies than in any other state. OSU, I'm certain, has the same ethical issue.
- There is no need to cut old growth. There is no need to cut Elliot. Cut your tree plantations.
- I am writing to urge you to take a skeptical view of the proposal to transfer the Elliott State Forest (Oregon's only old-growth state forest) to Oregon State University to be managed as a "research forest".
- I agree with the following statements and urge the oregon state land board to fully protect osu's research forests from being used as piggy banks.these forests need to be protected for their critical habitat and old growth trees and research which is their intended purpose.allowing osu to flaunt this agreement ,which seems to be a pattern to bring in revenue,is troubling.
- OSU has a huge credibility issue in regard to managing Elliot Forest. We need the strongest legal safeguards to meet the goals of maintaining this forest's mature trees and wildlife, with clear consequences for failure to follow the law. OSU seems to define "management" as the guidelines around commercial forestry. Surely "research" should encompass more than how to maximize revenue. They need to define what the research goals and strategies are and how this will enhance understanding and preservation of unlogged, natural, and diverse forests and the wildlife and other vegetation therein. (Surely they already know plenty about what happens after the trees are cut!)

In this day of worldwide climate protest it is essential that old growth forests be preserved. Especially given the fact that logging produces so little income for the state, and so few jobs. Every mill town, past and present, is perpetually mired in poverty. Cutting the Elliott won't do anything to change this.

Time to preserve the Elliott, permanently.

Sincerely,
Mr. Mike Quigley
1013 Kaylee Ave Junction City, OR 97448-9697 silailo@comcast.net

Dear members of the Oregon State Land Board,

I am dismayed by the proposed transference of the Elliott State Forest-to Oregon State University (OSU). OSU is a proponent of clear-cutting, which maximizes profit and is ecologically damaging. Clear-cutting is an eyesore and sends the message to future generations that grab everything you can get today and leave tomorrow for someone else to worry about. I grew up on a farm bordered by Weyerhauser on three sides: they swept in, harvested the trees and then sort of replanted but often left the grounds in an unusable state. "Management" is maximum profit run wild.

OSU has clear ties to the timber industry and "forestry." The Oregonian has reported extensively on the mismanagement of lands already entrusted to OSU. https://www.oregonlive.com/environment/2019/07/majestic-douglas-fir-stood-for-420-years-then-oregon-state-university-foresters-cut-it-down.html?emci=b2a7cc41-46da-e911-b5e9-2818784d6d68&emdi=2e8bfdee-23db-e911-b5e9-2818784d6d68&ceid=3994755 Why on earth would you put more forests into their portfolio?

What message do you think handing these lands over to OSU would send to all students who across Oregon protested American leadership on climate change this past Friday? When is Oregon's political leadership going to be good stewards of the land? Oregon's history is a history of promoting forestry, natural resource exploitation, but the consequences of short-term thinking is being apparent in the multiple environmental crises our planet is facing. What kind of legacy do you want leave?

This is public land. Surely turning it a state forest or state park would be a better option. The future is tourism, not forestry.

Sincerely,
Mr. Adam Crane
4506 SE Raymond St Portland, OR 97206-5086 adamacrane@gmail.com

Dear members of the Oregon State Land Board,

Have you ever read “Silent Spring” by Rachael Carson? I read her warning shortly after it was published, while I was studying to be a science teacher in Illinois. I had not been paying attention to what was going on in the natural world, but she shocked me back to reality.

When I moved to Oregon after graduation I started learning about its habitats and wildlife and if there were other warnings to pay attention to. I saw my only Spotted Owl in a mature/old growth forest with the help of Eric Forsman. It was one of the most awesome and spiritual experiences in my lifetime.

Spotted Owl numbers have been declining for decades when their specialized habitat turned into another tree plantation. Another “Silent Spring” is happening in the skies over the United States and Canada again, eight million and counting. This time around, due to more than pesticides.

I want the Elliott Forest to be a learning place of the natural world so a feeling of awe will bring all ages of humans back to reality to try and save this planet.

How much harvesting will be allowed in the Elliott and where? I want hands off the old growth and mature trees. There’s so little left. If OSU leads the planning of the Elliott’s future, who will monitor OSU?

OSU gave up planning the McDonald-Dunn Research forest 10 years ago and they have been using the trees as their own piggy bank for poor planning to show off the end product of harvesting. They not

only destroyed healthy, significant habitat for wildlife, but released centuries of sequestered carbon into an atmosphere. I want these issues addressed in the management of the Elliott.

Please assure Oregonians that whatever direction is taken it needs to be in writing to OSU. They have acted badly and many Oregonians have lost faith and our trust in their decisions waning.

Sincerely,
Ms. Delores Porch
1212 34th Ave SE Albany, OR 97322-8702
verandafay@gmail.com

From: **David Gould** <cbto1974@yahoo.com>
Date: Mon, Nov 25, 2019 at 6:48 AM
Subject: Fire in the Elliott Carbon Forest
To: Peter Harkema <pharkema@pdx.edu>, WALKER Vicki <vicki.walker@dsl.state.or.us>, Kevin Bogatin <kbogatin@nbend.k12.or.us>, Melissa Cribbins <mcribbins@co.coos.or.us>, Margaret Bird <margaretraybird@gmail.com>

I have documented a reburn of the 1868 fire between Scofield Creek, Loon Lake, and Glasgow in 1879. My grandparents homesteaded in this vast area in todays Elliott State Forest in 1886 because of the vast open grazing land. There were no trees for sea birds to nest in for miles. 71,105 acres were made a Children Trust for all revenue to go to the Common School Fund. A take of these funds has occurred and I demand that legal action to protect the children be established. This forest cannot be decoupled without the billion dollar value payed to the beneficiary. It is time for all to request for a attorney to take on this political stunt.

David Gould
Advocates for School Trust Lands
North Bend School District #13
Save the Elliott Forest
541 756 5464

From: Doug Pollock <timberframing@gmail.com>
Sent: Monday, July 29, 2019 11:38 AM
To: MASIBA Meliah <Meliah.M.Masiba@dsl.state.or.us>
Subject: Fwd: Your Response of July 22nd (to OSU Dean)

Dear Ms. Masiba,

Could you please forward this message to the Elliott Advisory Committee members?

Thanks so much for your help!

Doug Pollock
(Friends of OSU Old Growth)

---------- Forwarded message ---------
From: **Doug Pollock** <timberframing@gmail.com>
Date: Mon, Jul 29, 2019 at 1:33 PM
Subject: Your Response of July 22nd (to OSU Dean)
To: <vicki.walker@dsl.state.or.us>
Cc: <oregon.treasurer@state.or.us>, <jason.miner@oregon.gov>, Sen Gelser <Sen.SaraGelser@oregonlegislature.gov>

Dear Director Walker,

I am contacting you to clarify some points raised by your recent letter ("DSL Response to Recent OSU Harvest on McDonald Forest") sent to OSU College of Forestry Dean, Anthony Davis (attached below). In your letter, you wrote:

"Thank you for your letter addressing ... the unintentional harvest of several old growth trees."

You should be aware of a few key facts regarding OSU's "No Vacancy" harvest. First, *15.6 acres* of mature forest containing several DOZEN old-growth trees was harvested. OSU had previously determined the origin date of this stand to be 1759, and many of the trees were considerably older. One of the trees cut was verified to be 420 years old, and dozens were in the 200-300 year age range. In addition, OSU had previously harvested an adjacent stand of mature forest (of ~11 acres). You seem to have the mistaken impression we're only talking about a handful of old trees. I'd encourage you to spend some time looking at the photos on our website (www.friendsofosuoldgrowth.org) documenting the harvest activities. We also have scores of additional close-up photos documenting the diameter and growth ring details of the harvested logs. These photos serve as documentation that clearly shows the significant scale of old trees destroyed.

I appreciated your focus on the need for "transparency and an open dialogue" (from OSU). I'll be communicating more information on these specific topics to the Advisory Committee soon. Thanks also for your recognition of, "the Land Board's principles and Oregonians' expectations to respect and protect the Elliott." This is key to the success of DSL's efforts!

Sincerely,

Doug Pollock
(Friends of OSU Old Growth)

Oregon
Kate Brown, Governor

Department of State Lands
775 Summer Street NE, Suite 100
Salem, OR 97301-1279
(503) 986-5200
FAX (503) 378-4844
www.oregon.gov/dsl

Dr. Anthony Davis
Oregon State University
College of Forestry
140 Peavy Hall
3100 SW Jefferson Way
Corvallis, OR 97333

July 22, 2019

Dr. Davis:

Thank you for your letter addressing the recent activity in the McDonald Research Forest that resulted in the unintentional harvest of several old growth trees. We appreciate the University's vocal recognition of the mistake and your subsequent decisive action to ensure it doesn't happen again.

As you know, the State Land Board last year charged the Oregon Department of State Lands to work collaboratively with Oregon State University to transform the Elliott into a research forest under the ownership and management of OSU's College of Forestry. As a part of this process, the Department has convened an Advisory Committee that is discussing a variety of issues to help inform OSU's anticipated proposal.

We are now approximately halfway through that process, which may result in the college bringing a plan to the Land Board for consideration in December. Any plan to successfully take over ownership of the Elliott must uphold key conservation principles previously articulated by the Land Board.

I am encouraged with your leadership in addressing the regrettable loss of these incredible specimens of Oregon old growth. The lessons learned from this recent incident in the McDonald forest reinforce the need for transparency and an open dialogue as we balance the needs for public access, recreation, wildlife habitat and timber management.

I look forward to seeing how this learning opportunity is reflected in OSU's plan to manage a research forest in a way that is consistent with the Land Board's principles and Oregonians' expectations to respect and protect the Elliott.

Best regards,

Vicki L. Walker, Director
Oregon Department of State Lands

Sept. 9 2019

APPENDIX G

Dear Governor Brown and Vicki Walker,

This letter is to ask you to please consider very carefully the current plans for OSU to take over management, and perhaps even ownership, of the Elliott State Forest. I am very concerned that OSU has been logging some of their finest forests of old growth without having a management plan in place.

This is unacceptable behavior as we consider them as managers of the Elliott State Forest.

Please be willing to take a stand on this issue, as needed, and not allow them to simply proceed outside of integrity and good decision making.

Thank you.

Sincerely,

Mary Person

1490 Agate Ave

Eugene, Oregon

97401

RECEIVED
SEP 13 2019
DEPARTMENT OF STATE LANDS

P.S. We must be sure that OSU's budget is not linked to logging in the forest.

Love you

September 30, 2019

State Land Board

775 Summer St. NE

Salem, Oregon 97301-1279

Subject: Proposed Sale of Elliott State Forest

Dear Governor Kate Brown and members of the State Land Board

I am writing again on the issue of the sale/transfer of Elliott State Forest to the State Land Board.

I am against this property transfer because this is shutting down a source of timber that we need for housing, buildings and paper products. We need jobs in this area of the Oregon coast. Ninety thousand acres were set aside for Elliott State Forest so it would provide funding for educating our children. This transfer is going to hurt loss of jobs and loss of funding to help educate our children.

Governor Kate Brown has expressed a goal to build affordable housing. When you restrict the primary source of timber for lumber, this means the price of lumber is going to go up. This will result in higher priced housing in the future.

I just took a short drive into Elliott State Forest and discovered that a large clear cut that took place approximately two years ago. I just looked at the north end of the project but I did not see any seedling fir trees had been planted. We have a State Law that requires replanting within two years. Is the State Land Board going to meet the requirements of the State Law?

I am enclosing a copy of my letter dated December 12, 2016. I expressed concerns about two noxious weeds. The Department of Forestry did come and spray the star thistle. I keep checking each year that this noxious weed if it is coming back. I talked to the State Land Board representative in Bend, Oregon about the Japanese Knotweed in 2016, but I have not had a satisfactory response to my request that this noxious weed in Elliott State Forest be eradicated. This weed is coming down stream onto my property whenever we have a heavy rainstorm.

Sincerely,

Leo Naapi

Leo Naapi

2178 Dean Creek Rd.

Reedsport, Oregon 97467

P.S. This property should stay in Dept. of Forestry.

APPENDIX G
December 12, 2016

State Land Board

775 Summer St. NE

Salem, Oregon 97301-1279

Subject: Proposed Sale of Elliott State Forest

Dear Governor Kate Brown and members of the State Land Board

I have read in the Eugene Register Guard that the Oregon Constitution specifies that the State Forests must be managed to put money into the Oregon Common School Fund. The State of Oregon will be in violation of this constitutional requirement once the $220 million from the proposed sale is gone. The General Fund is never going to have the funds to replace the annual loss is logging revenue. You are being very shortsighted in making this decision. The state needs to tell the environmental organizations you need to let us do our job required by the state constitution and quit hurting the education of our children.

The State of Oregon could have realized revenue from logging if state employee's and elected officials would have shown the backbone to stop protests by environmentalists on your logging sales in 2013. The number one goal of the Cascadia Wildlands is to stop all logging in the State of Oregon on private and public lands. I saw this information in the Coquille, Oregon newspaper a few years back.

I am disappointed that the State Land Board has not been more open about when this decision will be made.

I am also against State of Oregon financing this sale by selling state bonds. This indicates this is not a true arms length sale.

My property borders Elliott State Forest and I have discovered two noxious weeds that have been brought in or planted in Elliott State Forest. For approximately seven years Japanese Knotweed (Knapweed) has been coming downstream from onto my property during high water. This plant was probably planted as forage for elk. This plant is on the State of Oregon Department of Agriculture noxious weed list. The past three years I have discovered Star Thistle alongside the 2000 road that is at the southwest end of my property. This Star Thistle has apparently been brought in on construction equipment that has brought in with gravel to Elliott State Forest from eastern part of Douglas County. These two plants have never been on our property prior to 2000. My question is this. Will the new owners help me eradicate these two noxious weeds? Or will the State of Oregon Department of Forestry continue assisting in spraying the Star Thistle like they did last fall? The Japanese Knotweed presents a different problem because it is mostly growing along Dean Creek on the banks. I am occasionally finding some plants in my pasture.

The original decision is flawed that was made by the United States Forest Service regarding the Marbled Murrelet in that they only looked at the southern habitat (U. S./ Canadian border) of this bird. I have heard estimates of over 500,000 of these birds are located in Alaska and British Columbia. I protested in my letter to USFS in 1993 that they should look at the total habitat of the marbled murrelet. This bird should have never been listed on the Endangered Species List.

Sincerely,

Leo Naapi

Leo Naapi

October 8. 2019

Vicki Walker
Director
Department of State Lands
775 Summer St. NE, Suite 100
Salem, OR 97301-1279

Please see enclosed copies of correspondence sent to members of the State Lands Board re transfer of Elliot State Forest to Oregon State University, Department of Forestry.

I request the letters be made part of the public record and, if pertinent, included in briefings of the members of the State Land Board.

Sincerely,

Inga Fisher Williams
2824 NE Cesar E Chavez Blvd
Portland, Oregon 97212

ENCL (3)

September 24, 2019

Kate Brown
Governor State of Oregon
900 Court Street NE, Suite 254
Salem, OR 97301-4047

cc. State Lands Board
Division of State Lands

re Transfer of Elliot State Forest to OSU as research forest

As a former Corvallis resident, OSU graduate and past member of the Corvallis City Council, I still take a keen interest in news about OSU, its future plans for the area and its reputation.

When I was unable to attend OSU's earlier information sessions regarding the Elliot State Forest, I wrote directly to the OSU Department of Forestry as I could find no online information for commenting to describe my concerns regarding OSU's 10 research forests and adherence to the new individual forest management plans to guide the future of those tracts.

The decision by the State of Oregon to transfer the Elliot Forest to OSU makes me fear that it may turn out to be a move 'from the frying pan into the fire'. To guard against this sentiment as a public response and foster instead gratitude that a public sale was prevented this transfer must include safeguards against reckless, gratuitous logging that treats the forest as an ATM not a public legacy. There should be strict overview of the planned multiple use concept [which includes logging] and a covenant for protection against logging which ignores the value of public goods, such as clean water, clean air, preservation of bio-regions in the State and climate change mitigation provided by forests.

And here is the main reason for my letter to you. **You must be aware of the erosion of credibility** of OSU forest management plans [and with it of the entire institution] after the logging of old growth forest in MacDonald / Dunn Forest, some of the trees over 400 years old. I saw the newspaper article where Interim Dean Anthony Davis announced the moratorium on logging in a college memo July 12, about a month after a logging operation was conducted near Sulphur Springs in the McDonald-Dunn Research Forest: Davis is quoted as saying they 'made a mistake'.

Just as the OSU Athletic Program budget is in the red and a pitch for Reeser Stadium rehab is in the news one can see readily where the temptation to convert assets to cash might cast an eye on forest holdings. I urge you to review the public record of statement from OSU in explanation AFTER THE LOGGING of trees several hundred years old. News reports on the logging cited OSU representatives claiming that OSU should not be held accountable for violating its own plans which after all are merely plans and "ought not be taken word for word". These are incredible lapses of ethics from one of Oregon's oldest institutions of higher education

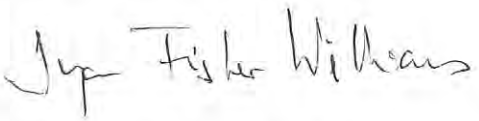
The Department of Forestry is directly implicated [as is OSU by association] in a spectacular show of disregard for the value of old growth trees; trees who predate OSU's formation as a land grant college.

One has to wonder about the department's [and OSU's] leadership and decision-making that allowed this raid of trees to happen in order to plus up a budget shortfall.

Not only trees, hundreds of years old, were sacrificed for short term gain; the reputation of OSU took a hit. In a callous and cynical disregard for its own plans, OSU set aside for financial expediency implicit commitments it had made to be a reliable actor. In my view, the principal individuals should be held accountable, their decisions viewed as malpractice and grounds for termination. At a time when the climate change mitigation provided by trees may in the long term well exceeds their value in board feet, OSU cannot be seen as stuck in an archaic philosophy, so very 'old school', as seeing 'lumber' when viewing a forest.

I urge you as you finalize the transfer of the Eliot State Forest to OSU that you will forestall such "mistakes" and make it mandatory that OSU follow its plans to safeguard the forest, truly as a research forest. The State's agreement must have assurances that prevent OSU from treating the forest as an asset to be plundered. You can make sure that the Elliott State Forest will not be treated, as merely a bank account for future withdrawals but instead OSU and its scientists will study its value to the State, not incidentally as a sink for carbon emissions.

Sincerely,
Inga Fisher Williams



2824 NE Cesar E Chavez Blvd.
Portland, Oregon 97212
ingafw@gmail.com - 971 344 5009

September 24, 2019

Tobias Read
State Treasurer
900 Court Street NE
Salem, OR 97310-0722

cc. State Lands Board
Division of State Lands

re Transfer of Elliot State Forest to OSU as research forest

As a former Corvallis resident, OSU graduate and past member of the Corvallis City Council, I still take a keen interest in news about OSU, its future plans for the area and its reputation.

When I was unable to attend OSU's earlier information sessions regarding the Elliot State Forest, I wrote directly to the OSU Department of Forestry as I could find no online information for commenting to describe my concerns regarding OSU's 10 research forests and adherence to the new individual forest management plans to guide the future of those tracts.

The decision by the State of Oregon to transfer the Elliot Forest to OSU makes me fear that it may turn out to be a move 'from the frying pan into the fire'. To guard against this sentiment as a public response and foster instead gratitude that a public sale was prevented this transfer must include safeguards against reckless, gratuitous logging that treats the forest as an ATM not a public legacy. There should be strict overview of the planned multiple use concept [which includes logging] and a covenant for protection against logging which ignores the value of public goods, such as clean water, clean air, preservation of bio-regions in the State and climate change mitigation provided by forests.

And here is the main reason for my letter to you. **You must be aware of the erosion of credibility** of OSU forest management plans [and with it of the entire institution] after the logging of old growth forest in MacDonald / Dunn Forest, some of the trees over 400 years old. I saw the newspaper article where Interim Dean Anthony Davis announced the moratorium on logging in a college memo July 12, about a month after a logging operation was conducted near Sulphur Springs in the McDonald-Dunn Research Forest: Davis is quoted as saying they 'made a mistake'.

Just as the OSU Athletic Program budget is in the red and a pitch for Reeser Stadium rehab is in the news one can see readily where the temptation to convert assets to cash might cast an eye on forest holdings. I urge you to review the public record of statement from OSU in explanation AFTER THE LOGGING of trees several hundred years old. News reports on the logging cited OSU representatives claiming that OSU should not be held accountable for violating its own plans which after all are merely plans and "ought not be taken word for word". These are incredible lapses of ethics from one of Oregon's oldest institutions of higher education

The Department of Forestry is directly implicated [as is OSU by association] in a spectacular show of disregard for the value of old growth trees; trees who predate OSU's formation as a land grant college. One has to wonder about the department's [and OSU's] leadership and decision-making that allowed this raid of trees to happen in order to plus up a budget shortfall.

Not only trees, hundreds of years old, were sacrificed for short term gain; the reputation of OSU took a hit. In a callous and cynical disregard for its own plans, OSU set aside for financial expediency implicit commitments it had made to be a reliable actor. In my view, the principal individuals should be held accountable, their decisions viewed as malpractice and grounds for termination. At a time when the climate change mitigation provided by trees may in the long term well exceeds their value in board feet, OSU cannot be seen as stuck in an archaic philosophy, so very 'old school', as seeing 'lumber' when viewing a forest.

I urge you as you finalize the transfer of the Eliot State Forest to OSU that you will forestall such "mistakes" and make it mandatory that OSU follow its plans to safeguard the forest, truly as a research forest. The State's agreement must have assurances that prevent OSU from treating the forest as an asset to be plundered. You can make sure that the Elliott State Forest will not be treated, as merely a bank account for future withdrawals but instead OSU and its scientists will study its value to the State, not incidentally as a sink for carbon emissions.

Sincerely,
Inga Fisher Williams

2824 NE Cesar E Chavez Blvd.
Portland, Oregon 97212
ingafw@gmail.com - 971 344 5009

September 24, 2019

Bev Clarno
Secretary of State
900 Court Street NE
Capitol Room 136
Salem, OR 97310-0722

cc. State Lands Board
Division of State Lands

re Transfer of Elliot State Forest to OSU as research forest

As a former Corvallis resident, OSU graduate and past member of the Corvallis City Council, I still take a keen interest in news about OSU, its future plans for the area and its reputation.

When I was unable to attend OSU's earlier information sessions regarding the Elliot State Forest, I wrote directly to the OSU Department of Forestry as I could find no online information for commenting to describe my concerns regarding OSU's 10 research forests and adherence to the new individual forest management plans to guide the future of those tracts.

The decision by the State of Oregon to transfer the Elliot Forest to OSU makes me fear that it may turn out to be a move 'from the frying pan into the fire'. To guard against this sentiment as a public response and foster instead gratitude that a public sale was prevented this transfer must include safeguards against reckless, gratuitous logging that treats the forest as an ATM not a public legacy. There should be strict overview of the planned multiple use concept [which includes logging] and a covenant for protection against logging which ignores the value of public goods, such as clean water, clean air, preservation of bio-regions in the State and climate change mitigation provided by forests.

And here is the main reason for my letter to you. **You must be aware of the erosion of credibility** of OSU forest management plans [and with it of the entire institution] after the logging of old growth forest in MacDonald / Dunn Forest, some of the trees over 400 years old. I saw the newspaper article where Interim Dean Anthony Davis announced the moratorium on logging in a college memo July 12, about a month after a logging operation was conducted near Sulphur Springs in the McDonald-Dunn Research Forest: Davis is quoted as saying they 'made a mistake'.

Just as the OSU Athletic Program budget is in the red and a pitch for Reeser Stadium rehab is in the news one can see readily where the temptation to convert assets to cash might cast an eye on forest holdings. I urge you to review the public record of statement from OSU in explanation AFTER THE LOGGING of trees several hundred years old. News reports on the logging cited OSU representatives claiming that OSU should not be held accountable for violating its own plans which after all are merely plans and "ought not be taken word for word". These are incredible lapses of ethics from one of Oregon's oldest institutions of higher education

The Department of Forestry is directly implicated [as is OSU by association] in a spectacular show of disregard for the value of old growth trees; trees who predate OSU's formation as a land grant college. One has to wonder about the department's [and OSU's] leadership and decision-making that allowed this raid of trees to happen in order to plus up a budget shortfall.

Not only trees, hundreds of years old, were sacrificed for short term gain; the reputation of OSU took a hit. In a callous and cynical disregard for its own plans, OSU set aside for financial expediency implicit commitments it had made to be a reliable actor. In my view, the principal individuals should be held accountable, their decisions viewed as malpractice and grounds for termination. At a time when the climate change mitigation provided by trees may in the long term well exceeds their value in board feet, OSU cannot be seen as stuck in an archaic philosophy, so very 'old school', as seeing 'lumber' when viewing a forest.

I urge you as you finalize the transfer of the Eliot State Forest to OSU that you will forestall such "mistakes" and make it mandatory that OSU follow its plans to safeguard the forest, truly as a research forest. The State's agreement must have assurances that prevent OSU from treating the forest as an asset to be plundered. You can make sure that the Elliott State Forest will not be treated, as merely a bank account for future withdrawals but instead OSU and its scientists will study its value to the State, not incidentally as a sink for carbon emissions.

Sincerely,
Inga Fisher Williams

2824 NE Cesar E Chavez Blvd.
Portland, Oregon 97212
ingafw@gmail.com - 971 344 5009

APPENDIX G

Director, Dept. of State Lands
775 Summer St. NE, Suite 100
Salem, OR 97301-1279

11. October, 2019

Dear Director Walker,

I'm the guy who discovered Oregon State University cut down 16 acres of old-growth forest back in May and founded the group, "Friends of OSU Old Growth" (www.friendsofosuoldgrowth.org). We now have nearly 600 people on our email list and have become a significant force for long-overdue change within and beyond the College of Forestry. I emailed you back in July to respond to your misperceptions about OSU's 'No Vacancy' cut (of 15.6 acres of old-growth forest, not "several old-growth trees" - see our website www.friendsofosuoldgrowth.org for details).

Our group has serious concerns about the leading role that OSU continues to have in developing a management plan for the Elliott State Forest. As you probably know, a previous Dean of the College (Hal Salwasser) abandoned their highly-regarded management plan for the research forests near Corvallis a decade ago. You should also know they abandoned their innovative management plan for the Blodgett Forest (located near Clatskanie). As Rob Davis reported in his scathing article in The Oregonian back in July, they did this in order to accelerate timber harvests to pay ($6 million) for cost overruns on their new forestry building. If OSU cannot follow their own management plans, why should we trust them to develop a plan for the Elliott? Even if they do not end up managing the lands, the resulting plan will likely benefit the industry that funds them - rather than prioritizing conservation and mitigation of climate change.

As I describe in the enclosed essay ("Seeds of Change in the College of Forestry"), the recent cutting of Old Growth is merely the culmination of decades of mismanagement within the College. I've also included a recent assessment of OSU's (lack of) compliance with their management plan written by Debra and Norman Johnson. I'm sure you know of the pivotal role Norm played in writing the Northwest Forest Plan in 1994. Debra worked in the College for 25 years, managing their GIS forest inventory. No one speaks with more authority and credibility about OSU's forest management plans than the Johnsons. With such a long history of poor forest management at OSU, why would anyone look to the Dean and his staff to provide leadership for the Elliott?! The Northwest Forest Plan virtually eliminated the cutting of Old Growth on public lands a quarter of a century ago - yet OSU is still cutting 200-400+ year-old trees in 2019! Members of your own advisory committee report that that Mr. Huntington and the OSU team still maintain they were following the plan (when they cut the Old Growth) - and that it was NOT a mistake. With such shameless deceit on their part, the public will have no confidence in any management plan OSU develops. Until you are willing to address these concerns in a transparent and public manner, Oregonians will be deservedly skeptical of your process.

As the Director of DSL, we look to you to provide leadership to change this sad situation. The OSU College of Forestry is polluted by money from the timber industry. The Dean's salary comes from a $5 million endowment from the former president and CEO of Roseburg Forest Products. The bulk of the funding for their new forestry building and their endowment has come from the industry they ought to be working to reform.

With climate change now an issue of paramount importance, we ought to be setting aside ancient forests (like the Elliott) for carbon storage - and forcing the industry to move to longer rotations and selective harvests. Instead, our nation's leading forestry school is operating like they are stuck in the 1980s.

We urge you to proceed with great skepticism and caution with regard to OSU's role in developing a management plan for the Elliott. The OSU Elliott Team represents the worst of their forest management - it is distinctly conservative and does not reflect the diverse expertise within the College. We also urge you to prioritize ecological values and carbon storage, not clearcuts and revenue generation, in the management of the Elliott. Manage these publics lands for the greater public good, for carbon storage, ecological value, clean air and water - not short-term profits! Future generations will thank you.

Sincerely,

Doug Pollock

(Friends of OSU Old Growth)
37293 Helm Drive
Corvallis, OR 97330

Seeds of Change in the College of Forestry (CoF)

Doug Pollock - Sept. 29th, 2019

Broken Trust: I've been a firsthand observer of OSU's forestry management practices in the McDonald and Dunn Research Forests for more than three decades. I've also participated in the planning process, attending OSU's meetings and giving input. In the mid-90s I joined a group of Soap Creek neighbors who were concerned about the College of Forestry's management of the newly-donated Cameron Tract. We met with the OSU President and initiated a public meeting with Dean George Brown and his research forest staff. Scores of neighbors showed up to express a wide range of concerns, ranging from herbicides polluting our wells, erosion from the planned clearcuts, and safety impacts of logging trucks on our narrow, twisty roads. Dean Brown and his staff promised to hold a second meeting to provide answers to our questions. Several weeks later, we all received letters thanking us for our input - and notifying us that cutting would begin soon. There was no mention of the promised 2nd meeting. Thus began my first lesson in how the College of Forestry deals with public input: they tolerate our input, but rarely embrace it; promises mean nothing.

When I discovered OSU had cut 16 acres of Old Growth near Baker Creek in May of this year, a whole new journey of discovery lay before me. Like the plot of some novel of deception and intrigue, the story unraveled in ways that felt both familiar and foreign. The forest manager who adamantly denied they'd cut Old Growth...the phony claims that signs of mortality and rot justified the logging, the bizarre explanation that the road they'd cut into the adjacent Old Growth was for purposes of a "fire break access point"...each revelation and excuse only dug a deeper hole for the Dean and his staff. The lack of honesty and integrity in OSU's response to the cutting only added fuel to the fire of community outrage and opposition. The cutting of Old Growth created enormous mistrust and anger, while the denial and obfuscation by CoF staff further eroded the public trust of OSU.

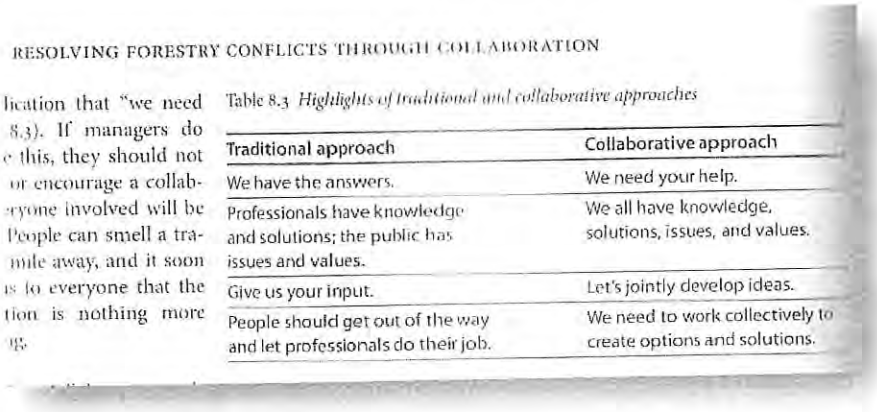
Community Response: I organized a group of neighbors to form **Friends of OSU Old Growth** in order to protest the cutting of Old Growth and the College of Forestry's misguided forest management. We developed a website (www.friendsofosuoldgrowth.org) to advocate for preservation of the remaining, unprotected Old Growth in the forests managed by the College. We were instrumental in getting *The Oregonian's* Rob Davis to write his extensive expose, "Majestic Douglas fir stood for 420 years. Then Oregon State University Foresters cut it down" (1). The response from the broader community has been overwhelming. We now have over 500 members receiving email updates and more than 1200 signers of our petition. OSU faculty members, alumni, recreational users, and others who care about the forests have come together not only to preserve Old Growth, but also to call for change in OSU's forest management.

I've been even more surprised and gratified by the many CoF insiders (including several emeritus professors) who have contacted me to divulge details of past misdeeds within the College. A former insider gave an account of graft within the research forest management, detailing how more than 700,000 board feet of timber was misappropriated from the Blodgett Forest in the early 90s. The whistle-blower was fired by a former Research Forest Director, and he reported the crime to the Oregon Governor's office. By the time state officials investigated, evidence of the theft had been erased from the College's records. A former employee of the College told of research requests that were routinely used to justify much larger harvests (against the wishes of the researchers). Neighbors told of the CoF's intentional logging of several other areas of Old Growth. A researcher disclosed that a former Dean had declared spotted owls nesting in the OSU forests as irrelevant - opposing OSU's own spotted owl expert. I heard numerous stories of unrepentant hardliners within the CoF who worked to oppose the preservation of Old Growth (including the Baker Creek and Sulphur Springs stands). These hardliners dominated the management practices of the research forests for many decades, giving OSU a dark reputation as a tool of the timber industry. An owner of a forestry consulting business stated he won't even consider hiring OSU Forestry graduates because they are so lacking in appreciation of ecological forestry values. An entire generation of OSU forestry graduates are stumped when asked, "Who was Aldo Leopold?"

OSU's Response: As the story of OSU's cutting of Old Growth gained national attention, the Dean's narrative changed in sadly predictable ways. His initial admission that it was a "mistake" and did not align with OSU's principles, morphed into conflicting variations. He later claimed they were following the principles of their (10-year-suspended) 2005 Research Forest Plan - "just not to a T" (*The Oregonian*). In a July 23rd CNN.com story, he said, " For years we've had plans that these trees would be harvested, our mistake was in sticking to that (2005) Plan" (2). Recently, the Director of the Research Forests gave a private tour of the 'No Vacancy' clearcut and adamantly stated it was NOT a mistake to cut the Old Growth - that they were following the plan. The same conflicting message is reportedly being told by OSU's team working on the Elliott State Research Forest project with the Oregon Department of State Lands (DSL).

In response to public concerns about OSU's forest management, the Dean and his staff held a public meeting (on August 28th, in Adair Village). Many participants expressed concerned about the unbalanced format of the meeting, following the traditional, "You have the questions, we have the answers" structure. This predictable, outdated response is captured in the following table. Like former Deans, the Interim Dean has resisted requests to change to a more collaborative approach.

The traditional vs. collaborative approach to solving forestry issues (3):



RESOLVING FORESTRY CONFLICTS THROUGH COLLABORATION

lication that "we need 8.3). If managers do e this, they should not or encourage a collab- eryone involved will be People can smell a tra- mile away, and it soon s to everyone that the tion is nothing more gs

Table 8.3 *Highlights of traditional and collaborative approaches*

Traditional approach	Collaborative approach
We have the answers.	We need your help.
Professionals have knowledge and solutions; the public has issues and values.	We all have knowledge, solutions, issues, and values.
Give us your input.	Let's jointly develop ideas.
People should get out of the way and let professionals do their job.	We need to work collectively to create options and solutions.

The Dean's chatter about his childhood, sense of place and optimizing forestry to solve the climate and sustainability crisis stood in stark contrast to how he and his staff have been managing the research forests. This disconnect is at the heart of these issues, leaving many folks highly mistrustful. The talk just doesn't match the long history of OSU's forestry mismanagement.

Violations of the Plan: Unfortunately for the Dean and his staff, the many violations of the 2005 Plan are as plain to see as the growing number of clearcuts in the forests. A recent assessment by Debra L. and K. Norman Johnson (4) provides unequivocal documentation of the violations. They detail how the cutting of Old Growth at Baker Creek and numerous other harvests all violated the commitment to maintain the 1,585 acres of nesting/roosting/foraging (NRF) habitat for northern spotted owls. They estimate the total NRF has been reduced by ~166 acres or more than 10% in the past three years. They also point to 10 clearcuts in the South Zone of the McDonald Research Forest that greatly exceeded the 1-4 acre harvest prescription. These are not minor oversights or adjustments - they are wholesale violations of the plan's principles. The Johnsons were involved in developing and implementing both the 1993 and 2005 Research Forest Plans. No one speaks with more authority and credibility when it comes to OSU's forestry plans. For the Dean and CoF staff to insist they are following the principles of the plan is shamefully dishonest.

Faced with such blatant disconnects and dysfunction, it is reasonable to ask how might one go about changing OSU's deeply-entrenched and outdated approach to forestry. With contributions from the timber industry permeating the College and funding the Dean's position, is there any hope of substantive change? Before considering these questions, it

is helpful to take a moment to discuss the theory of change in large organizations. In *Ecological Forest Management* (3), the authors cite work by Gunderson (1995) and Janssen (2002) showing that natural resource policies in the U.S. have evolved in ways that are very similar to biological systems:

Four Phases of Policy Development and Change

1) Initial robust policy implementation followed by increasing rigidity over time as the policy matures and bureaucracies become committed to it.
2) Challenge to the policy by activities based on differences between expectation and observation, which can create a crisis and lead to policy collapse.
3) Catalysts for change taking action, helping create a bridge to a new policy.
4) Development of new policy alternatives followed by policy selection and implementation, and the cycle beginning again. (5)

They write:

> "Initially robust policies become rigid, often with a single-minded emphasis on maximizing one aspect of resource management. The responsible agency becomes so invested in the policies, and the social forces that benefit from them are so powerful, that the agency cannot adjust as problems and circumstances change. Political and legal activists eventual take actions that result in policy disintegration, followed by individuals and groups whose ideas serve as catalysts for change"(3).

Following in the Footsteps of the USFS: The authors of *Ecological Forest Management* also cite the highly relevant example of federal forest policy and over-harvesting, leading up to the Northwest Forest Plan of 1994. OSU's College of Forestry seems to be following a similar trajectory:

Box 11.1 **Federal forest policy in the Pacific Northwest: An illustration of policy development, rigidity, collapse, and renewal**

The pent-up demand for wood for housing after World War II, combined with the inability of private forests to meet this demand, led to a major expansion of harvests in the magnificent old-growth Douglas-fir forests on the national forests of western Oregon and Washington. The Forest Service encouraged construction of new lumber and plywood mills to process the timber, and many communities expanded to accommodate the arrival of more mill workers and loggers. For the first time, these federal forests harvested their entire *allowable cuts*, which were based on the principle of sustained yield. Federal timber harvest became a central element in the regional economy. Tens of thousands of people found employment logging and milling the harvest. Through the 1950s and 1960s, timber management was the dominant use of these federal forests, and this emphasis was strongly supported by the congressional delegations of the two states.

By the early 1970s, the Northwest's federal timber economy functioned as a highly efficient machine, clearcutting thousands of acres of old forests each year to provide logs for hundreds of mills and replacing the cut forests with fast-growing plantations. Allowable cuts were based on the promise of intensive management and high yields from the plantations. Other uses of the forest were given only modest consideration, under the presumption that a sustained yield of timber harvest, carefully done, would benefit the other resources, whether they were fish, wildlife, or watersheds.

Passage of the National Forest Management Act (1976), in large part a reaction to the increased emphasis on timber production in the national forests, required development of integrated forest plans following procedures specified in the National Environmental Policy Act of 1970. The necessity for interdisciplinary planning and development of integrated forest plans resulted in a major challenge to the mantra that sustained yield provided for all uses. Through the 1980s, the Forest Service worked on developing forest plans, but meeting nontimber resource goals frequently required reductions in allowable cuts, which resulted in major opposition from both internal and external sources. Largely ignored were repeated pleas from district rangers that existing allowable cuts could not be sustained without damaging other resources and scientific studies that documented the threat of these harvest levels to wildlife and to forest ecosystems. Each year the Chief of the Forest Service sat before congressional appropriation committees and assured them the Forest Service could maintain the harvest level, and the allowable-cut juggernaut rolled on.

After more than a decade of work, the national forests released forest plans that called for slight reductions in allowable cuts; old-growth forests would still provide much of the harvest. The plans were litigated over protection for the northern spotted owl, and the courts granted an injunction prohibiting harvest in northern spotted owl habitat until the agency developed a scientifically credible plan for conservation of the owl. With that injunction, timber harvesting on national forests in the region essentially ceased, with wrenching disruptions in the lives of thousands of people.

After the Forest Service failed repeatedly to satisfy the courts with new plans that protected the owl while maintaining relatively high harvest levels, the agency created a team of scientists with expertise in the ecology of the northern spotted owl and charged them with developing a forest management strategy that would satisfy the courts. The science team developed a strategy based on the principles of conservation biology, greatly increasing the area that would be placed in reserves and also modifying management practices in intervening areas to facilitate dispersal of owls between the reserves. However, the White House would not allow the Forest Service to adopt the strategy because of protest from Congress.

Congressional committees concerned with national forest management recognized that the owl was just one of many issues that needed to be addressed. They chartered another scientific committee and charged it with synthesizing relevant information in developing and evaluating management alternatives for conserving old-growth forest ecosystems and their constituent species, aquatic habitat for at-risk fish stocks, and species listed as threatened or endangered such as the northern spotted owl and marbled murrelet. While accepting the alternatives that the scientists developed as a fair representation of the choices, Congress did not pass legislation that addressed the issues involved—the reduction in timber harvest needed to conserve species and ecosystems was just too great.

Building on the preceding reports, newly elected President Bill Clinton created yet another scientific committee, which included social scientists for the first time, to develop alternatives that could provide the basis for a comprehensive plan for these forests (FEMAT, 1993). These efforts culminated in his decision to adopt what became the Northwest Forest Plan in 1994. This plan placed conservation of biodiversity and watersheds first and timber harvest second, reversing historical post-WWII priorities on the national forests, and substantially reducing the timber harvest level.

All elements of the adaptive cycle appear in this story: (1) initial robust growth of a vibrant policy for advancing social well-being, with rigidity and inflexibility developing as maintaining allowable cuts became too economically and politically important to modify; (2) abrupt collapse of the policy after being challenged in court; (3) development of new policy ideas and alternatives by ad hoc groups of scientists outside of agency control; and (4) adoption of a policy by a decision maker (President Clinton) that put the federal forests of the region on a new path.

A history of federal forest policy in the Pacific Northwest leading up to the NW Forest Plan (3).

After decades of overcutting by the timber industry and the systemic failures of the Forest Service and Congress to come up with meaningful protections for threatened and endangered species, newly elected President Bill Clinton got involved. The result was the 1994 Northwest Forest Plan which "placed conservation of biodiversity and watersheds first and timber harvest second". An outside decision maker (President Clinton) delivered a new policy which forever changed the path of forestry in the Pacific Northwest (3).

The analogies to the OSU College of Forestry are particularly relevant and powerful - at least up to the point of crisis and dysfunction. As my opening story relates, the managers of the research forests have had a long history of ignoring public input - and even their own carefully developed, inter-disciplinary plans. The last plan was developed in 2005 and the next one isn't expected for at least three more years - a 17-year lapse. The College also operated without an updated forest inventory or GIS staff for a full decade. How can a public entity managing 15,000 acres of land justify operating for so long without a plan and accurate forest inventory?

Priorities of the CoF: Revenue generation has clearly been given priority over other values in the management of the College forests - and the planning process. *The Oregonian* reported, "$6 million in accelerated timber sales from the school's forest near Clatskanie are being used to help defray cost overruns for ...the Oregon Forest Science Complex"(6). These cuts happened after the Research Forest managers abandoned their innovative 1997 management plan for the Blodgett. The suspension of the Research Forest Plans for both the McDonald-Dunn and Blodgett Forests (last updated in 2005 and 1997 respectively) paints a picture of a decidedly insular organization, focused primarily on revenue generation, not research and education. The failure to incorporate carbon assessments (as called for in the 2005 Plan) or any meaningful changes to forestry practices to reduce climate change is another serious omission.

Lack of Integrity: The lack of transparency and bias toward revenue generation has also characterized the Dean's Tier 1 Advisory Committee, tasked with developing the mission and goals for the next Research Forest Plan. This committee met for nearly two years, with little or no public notice. The committee was given a mandate to come up with $2 million in revenue from timber harvests, arguably biasing their work from the onset. The sole public representative on the committee would not disclose the names of the committee members, apparently upon the direction of the Research Forests Director. It took three separate email requests to get the Dean to disclose the names of the committee members. Key questions about the committee's work remain unanswered after repeated requests to the Dean and OSU's Communication Director. The refusal to answer fundamental questions constitutes a restraint of information and clearly violates OSU's own core values (7):

> **3) Integrity.** ***We value responsible, accountable and ethical behavior in order to maintain an atmosphere of honest, open communication and mutual respect throughout the Oregon State community.***

Genesis of Change: Given the long history of mismanagement, the seriousness of the problems, and the significant pressure from timber company interests and revenue needs, it seems doubtful change will come from the managers of the research forests. Many CoF insiders and alumni tell me change has to come from outside the College - just as the timber industry of the 1980s and 90s only changed when powers beyond their control forced it upon them. We now have growing awareness of climate change and the huge carbon impacts of logging and timber production. This societal pressure on the College's forest management will only increase - both within and outside OSU. Three decades of climate data and consensus among the world's climate scientists (including many at OSU) tell us this is so. Furthermore, citizens increasingly view OSU lands as public lands - and they expect them to be managed for the public good. The public will demand a collaborative role in this process, a change that surely frightens the traditionalists within the College. In addition, the huge power of social media, email, and the Internet mean that OSU can no longer control the dialogue or message. When the story of OSU cutting a 420-year-old tree shows up on the home page of CNN.com, it has a lasting, negative impact on the University.

Seeds of Change: If the OSU administration is truly committed to changing the College of Forestry, it will need to lead the process. Here are some specific steps to take:

1) Restore the management plans for the McDonald-Dunn and Blodgett Forests - and follow them to a T. This must be done with a strong public commitment.

2) Make the study and mitigation of climate change the highest priority for all College operations. Do detailed carbon assessments (as called for in the 2005 Plan). Stop all burning of logging slash piles. Make the research forests a leading example of ecological forestry management.

3) Play the leading role in transforming practices of the timber industry to minimize climate change and prioritize ecological functions through education, research and advocacy. Exhibit this leading role by demonstrating the very best practices (prioritizing ecological values and carbon storage and mitigation) in the OSU research forests.

4) Publicly commit to preserving ALL late successional reserves on OSU lands, not just trees over 160 years old. Late successional forests are now largely protected in our federal forests - OSU should be matching or exceeding this relatively low bar. Start by changing the status of the Sulphur Springs stand to protect the remaining 36 acres of Old Growth.

5) Disconnect timber industry funding from key positions within the College of Forestry, including the Dean's endowment. This funding presents an enormous conflict of interest, biasing decisions at all levels of the College.

6) Fully disclose all sources of funding for the College in an annual report presented to the public. This includes revenue from each timber harvest, donations to the endowments, funding of the new forestry building, research, and education. The public has a fundamental right to know where the money is coming from and where it is going.

7) Change the planning process for the next Research Forest Plan to make it a truly collaborative process with public involvement. Make sure that the planning team is NOT biased toward revenue generation, but rather prioritizes ecological values and carbon mitigation and storage.

8) Develop an independent assessment process with clear performance metrics to gauge the College's compliance with their forest management plans. Publish the results. Hold a public meeting each year to present the results and discuss management plans for the coming year. Hold public tours on an annual basis to demonstrate management and research activities.

9) Choose a new Dean who is truly committed to positive change within the College of Forestry.

10) The OSU President, Executive Committees, and Board of Trustees must provide leadership and support for these changes - history has shown change will not come about without high-level support.

---

(1): *The Oregonian*, https://www.oregonlive.com/environment/2019/07/majestic-douglas-fir-stood-for-420-years-then-oregon-state-university-foresters-cut-it-down.html

(2): CNN.com, https://www.cnn.com/2019/07/23/us/old-growth-trees-cut-oregon-state-trnd/index.html

(3): *Ecological Forest Management*, by Jerry Franklin, K. Normal Johnson, and Debora L. Johnson, 2018

(4): *Damaging Ecological Resources Protected by the 2005 Forest Plan: Recent Harvests on the OSU McDonald-Dunn Forest,* by Debora L. and K. Norman Johnson, https://friendsofosuoldgrowth.org/latest-news/

(5): *Panarchy*, by Lance H. Gunderson and C.S. Holling, 2002

(6): Old growth, new questions for OSU, by Rob Davis, *The Oregonian*, July 27th, 2019

(7): https://leadership.oregonstate.edu/trustees/oregon-state-university-mission-statement

Damaging Ecological Resources Protected by the 2005 Forest Plan: Recent Harvests on the OSU McDonald-Dunn Forest

Debora L. Johnson and K. Norman Johnson 9/25/2019[1]

Summary

Between 2017 and 2019, ecological resources important for teaching, research, and demonstration, including an old-growth grove and areas of mature forest, were clearcut on the McDonald-Dunn Research Forest even though these resources were protected by the existing forest plan. When the old-growth harvest was discovered by a forest user, the Dean of the College of Forestry put in place interim guidance to protect old trees until a new forest plan is written. Given the College's inability to adhere to either the spirit or letter of the current plan, it is not clear how a new plan will help moderate the disregard for the protection of ecological resources that has been shown in the last few years. More immediate and fundamental changes are needed to bring the forest back into line with the primary mission of providing a biologically diverse and sustainable teaching, research, and demonstration forest with a management focus. Those changes include (1) adhering to the themes and guidance in the 2005 plan, including the protection for old trees, until a new plan is finished, (2) adding all of the candidate old-growth stands that were identified in 2004 to the reserves, and (3) having annual meetings and field trips to review recent and proposed harvests that highlight how the harvests meet the themes and guidance in the forest plan.

Introduction

The current controversy over management of the OSU McDonald-Dunn Forest began with a citizen publicizing the destruction of the Baker Creek old-growth stand. In response, Interim Dean Anthony Davis distributed a statement (7/12/19) that said the College of Forestry "made a mistake in carrying out this recent harvest" and also made the important commitment to protect trees over 160 years of age until the next plan is finished (Appendix 1). Dean Davis also said that the mistake occurred while they were "operating with the best of intentions and within the guidance of the 2005 Forest Plan" and that "The core themes identified in the 2005 Forest Plan still ring true today."

Certainly, no plan is perfectly implemented and mistakes do happen, even mistakes as egregious as cutting ancient trees. However, our review of recent harvests on the McDonald-Dunn Forest found a much broader problem: the 2017-2019 harvests documented in this report display a systematic violation of some of the fundamental themes and guidance in the 2005 Forest Plan intended to protect ecological resources. Whether these actions were precipitated by revenue pressures, or forest managers imposing their own idea of how forests should be managed, or for some other reason, we do not know. In some ways it does not matter--the key point is that ecological resources that the College committed to protect in the 2005 Plan have been damaged or destroyed.

To provide context for these findings, we first review the history of forest planning for the McDonald-Dunn Forest including the development of the 1994 and 2005 plans. Then we provide evidence that important ecological resources, including the Baker Creek old-growth stand, were damaged or destroyed in violation of the guidance and themes of the 2005 forest plan. Finally, we make recommendations to reduce the opportunity for these kinds of acts occurring in the future.

[1]Debbie Johnson is a consulting forester. She worked for the OSU Research Forests for 25 years on inventory, GIS and forest planning; Norm Johnson is Professor Emeritus of the OSU College of Forestry where he specialized in forest planning and harvest scheduling. Both were on the planning teams for the 1994 and 2005 McDonald-Dunn Forest Plans.

Background

The First Forest Plan: 1994

As the amount of clearcutting increased on the McDonald-Dunn Forest in the late 1980s and early 1990s, complaints from neighbors and recreationists also increased, and many critical letters and articles appeared in the Corvallis Gazette Times. In 1993 Dean George Brown formed an interdisciplinary team of faculty from across the university and asked them to develop a long-term plan for the forest. The Dean told the team to develop a forest plan that would best advance McDonald-Dunn as a teaching, research, and demonstration forest. Once that was done, the Dean said that he and the Forestry Executive Committee (FEC) would look at the revenue that would be produced by the plan to see if adjustments were needed. Dean Brown wanted to be sure that he and the FEC knew the degree to which revenue production was influencing the achievement of core goals.

That planning team quickly settled on a mission statement: "Develop McDonald-Dunn Research Forest as a biologically diverse and sustainable teaching, demonstration, and research forest with a management focus" (OSU College of Forestry, 1994).

To accomplish this mission and associated goals, the team divided the McDonald-Dunn Forest into three zones (OSU College of Forestry 1994, page 10):

1) "The South Zone will be managed to contain large trees within a structurally complex forest pattern. The goal is to create structures similar to those of an older, mid- to late-successional forest.
2) The Central Zone will be managed to test techniques for creating and maintaining two-storied stands, that is stands containing trees of predominantly two distinct ages and sizes over part of the rotation. The stands will be slightly less complex than those in the south zone, but they will contain significant numbers of large trees.
3) The North Zone will be managed generally to achieve younger, structurally more uniform stands for comparison with those of the Central and South Zones."

"Teaching and research are preeminent and will be accommodated in each zone as needed."

A sustainable harvest schedule was then developed to implement this forest management strategy. It turned out that a harvest schedule consistent with zone themes produced sufficient revenue and did not need adjustment. The spatial location of the harvests for the first decade was worked out to the satisfaction of the FEC after some back and forth adjustment to reduce the amount of clearcutting.

A Forest Advisory Committee was set up that included "OSU faculty members from the College of Forestry and other departments, as well as people from the community." The plan gave "the Forestry Advisory Committee significant responsibility for interpreting, evaluating and, if necessary, revising the Plan. Interested community members will be included in these efforts" (OSU College of Forestry, 1994).

Meetings were held with community leaders to explain the plan and a brief, colorful pamphlet was written for broad distribution (OSU College of Forestry, 1994). Almost overnight, complaints about the McDonald-Dunn forest management in the Corvallis Gazette Times greatly declined, helped by the very favorable coverage of the plan by the newspaper. The spatial harvest schedule, applying silviculture appropriate to each zone, was then followed for the next decade, providing a myriad of teaching and research opportunities and producing significant revenues. *The McDonald-Dunn 1994 Forest Plan was the only public forest plan in the State of Oregon successfully implemented during the tumultuous years of 1994-2003!*

The Second Forest Plan: 2005

The 2005 Plan was a revision of the 1994 Forest Plan. It maintained the idea of zone themes with different emphases to illustrate a range of approaches to forest management strategies and practices for use in teaching, research, and demonstration. The 2005 Plan was put together by a smaller interdisciplinary team that was mostly from the College of Forestry and was headed by Rick Fletcher (Forestry Extension) and Becky Johnson (Associate Dean of Forestry). The team took their direction from the FEC.

Once again, the Team was told to develop the best teaching, research, and demonstration plan and estimate the revenue that would be produced. After the team made an estimate, they were asked by the FEC to increase the area devoted to intensive management to enable a slightly higher revenue flow. With that modification, the FEC recommended the forest plan to Dean Hal Salwasser who then approved it. (See Appendix 2 for the signature page by the members of the FEC and the Dean. Dean Salwasser wanted the entire leadership team to sign their approval, in part so they would know the limits on the revenue that they could expect from the forest.)

Four Themes in the 2005 Plan

"To achieve the mission and goals for the Forest, land is allocated to one of four themes (Figure 1). Each theme relates to different management characteristics and different target stand characteristics and represents a different set of management objectives for Oregon forestland owners and managers" (OSU College of Forestry, 2005, page 19).

Theme #1: Short rotation wood production with high return on investment (35- to 45-year rotations of even-aged Douglas-fir that end with clearcut harvest)

Theme #2: High quality, growth-maximizing timber production (60- to 90-year rotations of even-aged Douglas-fir that end with clearcut harvest)

Theme #3: Visually sensitive, even-aged management (70- to 90-year two-storied forests of primarily Douglas-fir that always retain some even-aged tree cover)

Theme #4: Structurally diverse complex forest for multiple resource outcomes. Multi-aged, mixed species forests of primarily Douglas-fir established and managed using group-selection harvests, while maintaining structural diversity and associated habitats within stands. (Note: "**regeneration will occur after small, one to four-acre group selection harvests**" [OSU College of Forestry, 2005, page 24].) This theme occupies much of the South Zone of the McDonald-Dunn Forest and is a focus of the discussion that follows.

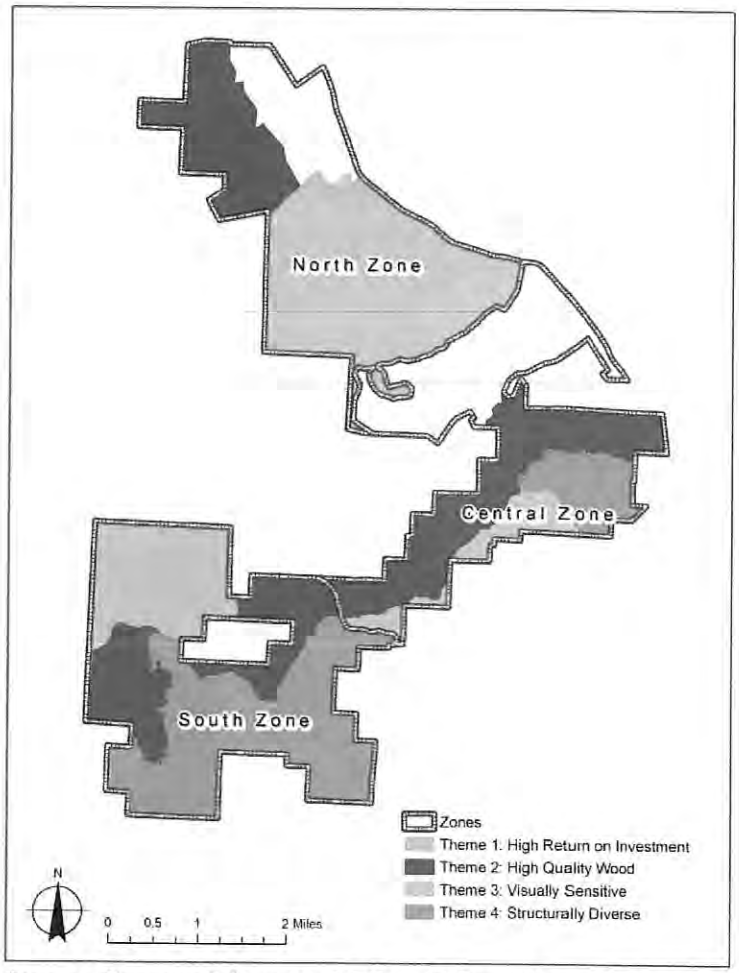


Figure 1. Zones and themes in McDonald-Dunn Research Forest.

Additional Commitments in the 2005 Plan

"Layered on top of the themes are many special areas and special issues:

- Old growth reserve areas have been maintained
- Nesting, roosting, and foraging (NRF) habitat for the northern spotted owls will be maintained
- Oak savannas, prairies, and woodlands will be evaluated and restoration projects implemented
- An invasive species control and containment program will be developed with a major focus on false-brome
- A hardwood analysis and management strategy will be developed
- Snags and down wood will become the focus of an extensive research program"

"Management of cultural resources on the forest is enhanced in the new plan by a new Memorandum of Agreement between the College of Forestry and the Confederated Tribes of the Grand Ronde."

"The plan projects harvests for the next 100 years and indicates approximately 6 million board feet/year will be harvested over the next decade. The actual yearly harvest will vary up and down depending upon a number of factors. Overall revenue produced by the forest is estimated at approximately 50% of maximum cash flow for timber production only."

A tentative harvest schedule for the first decade was designed, consistent with the zone themes (OSU College of Forestry, 2005, page 38).

The Commitment to Maintain NRF Habitat in the 2005 Plan

Most of the stands at issue in this analysis were classified as nesting, roosting, and foraging (NRF) habitat for the northern spotted owl (NSO). Characteristics of suitable NRF habitat include large (>30 inches in diameter) conifer overstory trees, an understory of shade-tolerant conifers or hardwoods, a high level of canopy cover, large, live and/or dead trees with suitable nesting platforms, and an understory that is open enough that owls can fly through it. A definition for NRF was crafted for the McDonald/Dunn Forest in 2000 using forest inventory and NSO telemetry data gathered in the South Zone (Figure 2) which was then used to delineate NRF stands. The classification generally covers the mature and old-growth stands in the South Zone (OSU College of Forestry, 2000).

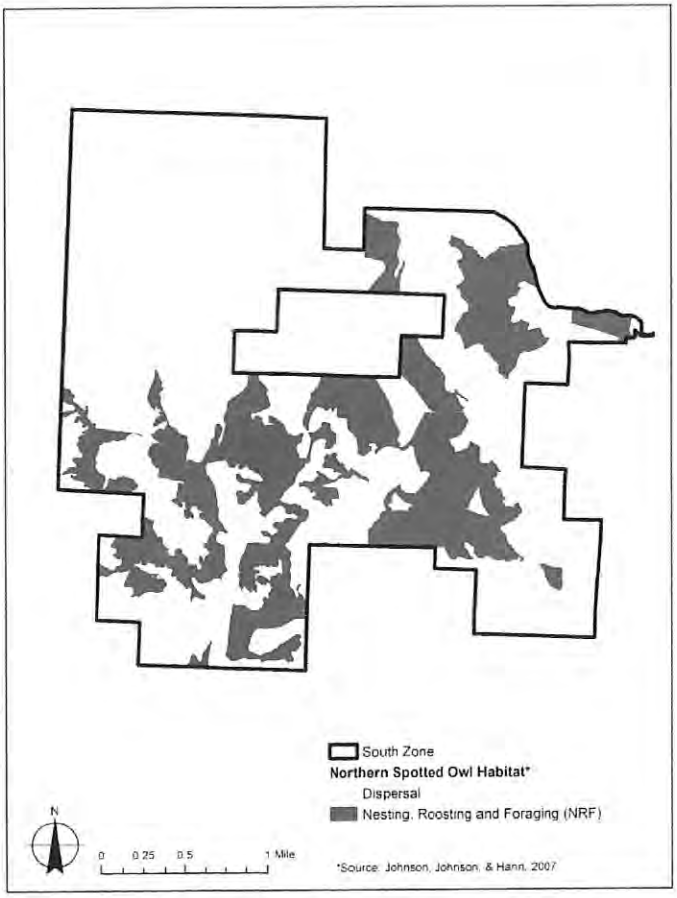


Figure 2. Nesting, roosting and foraging (NRF) habitat for the northern spotted owl in the South Zone of the McDonald-Dunn Forest. (Source: Johnson, Johnson, & Hann 2007)

The 2005 plan states (page 29) that "management activities will maintain the current level of NRF in the South Zone (1585 acres) . . . Forest staff will develop thinning regimes that maintain NRF and the associated timber yields." Thus, the NRF stands are not available for clearcutting under the plan but may be available for thinning if silviculturists and owl biologists conclude that such actions would help maintain or improve NRF. Eventually (after a few to many decades), other stands in the South Zone could grow into NRF and then there could be a surplus of NRF acres available for harvest using the method appropriate to the zone theme they fell into.

Concerns about maintaining NRF were brought about by the presence of NSO in the South and a portion of the Central Zones of the McDonald-Dunn Forest. A breeding pair of NSO was first documented in this portion of the forest by Eric Forsman between 1970 and 1974. The pair nested twice but abandoned the site after timber harvest activities occurred in the area. Surveys that were done in 1994 detected a breeding pair in the Oak Creek drainage of the South Zone. Between 1994 and 2004 three different pairs of spotted owls occupied five different nest sites (Figure 3) (Johnson, Johnson & Hann, 2007). Some of these nest site changes were probably the result of pressure from barred owls (an aggressive encroaching competitor).

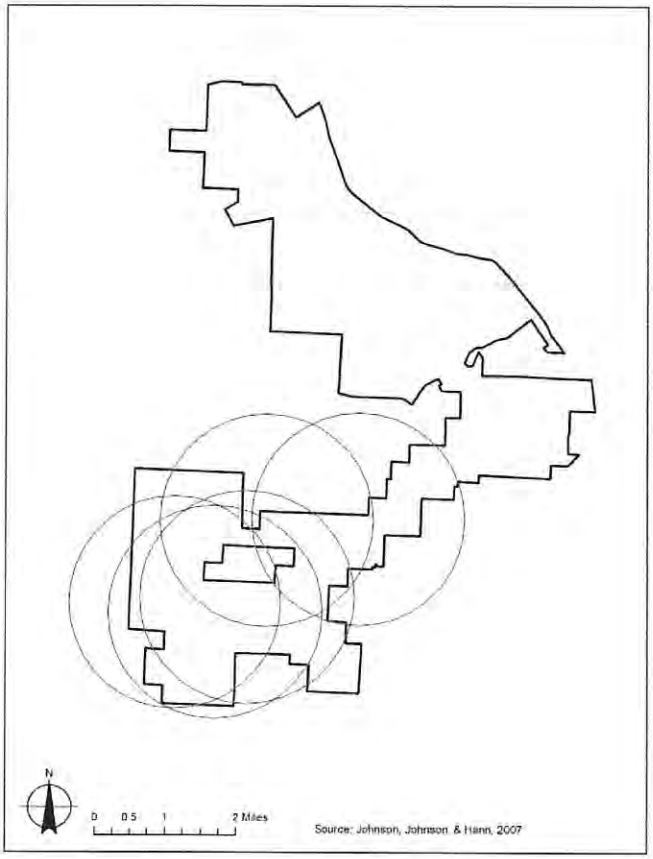


Figure 3. Historical home range circles for the northern spotted owl in the Mc-Donald-Dunn Research Forest. (Source: Johnson, Johnson & Hann 2007)

A key decision in the 2005 McDonald-Dunn Plan was to maintain the current level of NRF habitat for the NSO throughout the South Zone of the forest (OSU College of Forestry, 2005; Johnson, Johnson & Hann, 2007). Although the commitment to maintain NRF habitat in the South Zone was to ensure that NSO have suitable habitat across the Zone, regardless of where they move their nests or whether they are completely absent for some time, this commitment was also intended to ensure that some old, complex forest existed on the McDonald-Dunn Forest for teaching, research, and demonstration. How to actively manage these forests for the northern spotted owl while producing wood products was and is a significant forest management issue in Oregon. Maintaining the level of NRF habitat in the South Zone, while allowing treatments consistent with that goal, was intended to

provide a foundation for important teaching, research, and demonstration. The commitment to maintain NRF in the South Zone was not conditional on the presence of the northern spotted owl.

Implementation of the 2005 Forest Plan

Implementation of the plan began in 2005. Four complementary efforts were also completed: (1) a spatial harvest scheduling model built around a replicated set of treatments in the South Zone to help decision makers better evaluate the effect of different harvest strategies on northern spotted owls and revenue (Bettinger, Johnson & Johnson 2003), (2) a monitoring plan designed to drive an adaptive management process, (3) an invasive plant management plan that established priorities and detailed control prescriptions, and (4) a restoration plan for oak and prairie habitats (Legacy Oaks Task Force & Prairie Task Force, 2008).

This plan was implemented from 2005 to 2007. The Great Recession of 2008 caused the FEC to suspend timber harvest on all of the research forests beginning in 2009 because of the decline in log prices associated with the collapse of the housing market. Most of the forest staff were laid off.

Year-to-year timber offerings often vary from planned annual activity schedules in response to market conditions. In order to weather market fluctuations and recessions, the College of Forestry, like many other entities that manage timber, maintain reserve funds. During past recessions, the reserves were used to fund staff and infrastructure; when markets came back, deferred harvests were then implemented according to plan and the reserves replenished. The 1994 McDonald-Dunn Forest Plan stayed close to the scheduled harvest target both for volume and treatment type for the years 1994-2003, even though there were large oscillations in year-to-year harvest levels as the forest staff coped with "changing conditions, surprises and markets" (Johnson, Johnson & Hann, 2007). During that 10-year period, the annual harvest ranged from 200,000 board feet to 9 million board feet with an average annual harvest of 4.1 million board feet (OSU College of Forestry, 2005, page 38). The 2005 update is a continuation of this same approach to planning and should be expected to function similarly.

Damage to Important Ecological Resources through Clearcutting: 2017-2019

The Forest Plan provided specific guidance for protecting NRF and creating structurally diverse, complex forest. These resources provide outstanding teaching, research, and demonstration opportunities, but many have been clearcut in the last three years counter to the zone themes and guidance in the 2005 Forest Plan, damaging or destroying precious ecological resources as a result. This analysis focuses on 13 harvests that occurred between 2017-2019 in the South Zone.

During the past three years, 13 clearcut harvests have been completed in the South Zone that are not compatible with the 2005 Forest Plan. We cover them in two groups:

1. **The Baker Creek Old-growth Clearcut**. Part of an old-growth stand near Sulphur Springs on the McDonald-Dunn Forest was clearcut in May of 2019. This clearcut elicited controversy and outrage after scores of old trees up to 420-years-old were cut. In addition to the loss of a magnificent old-growth forest and habitat for the northern spotted owl, the harvest ruins habitat for other late-successional species, such as tall bugbane (Cimicifuga elata), a rare plant which occurs within or near the Baker Creek old-growth clearcut based on past survey information.

   This, and several other stands with old-growth characteristics were proposed to be included in the reserves, both in 1994 and 2005 (Figure 4), but there was not faculty consensus to include them. Although the Baker Creek stand was not put into the "old growth reserves", it was classified as NRF habitat for the NSO (Figure 5) and had one historical NSO nest site. Understory thinning might have been used if needed to maintain or improve NRF; however, clearcutting destroyed key forest structures (described above) that enabled the stand to function as NRF habitat.

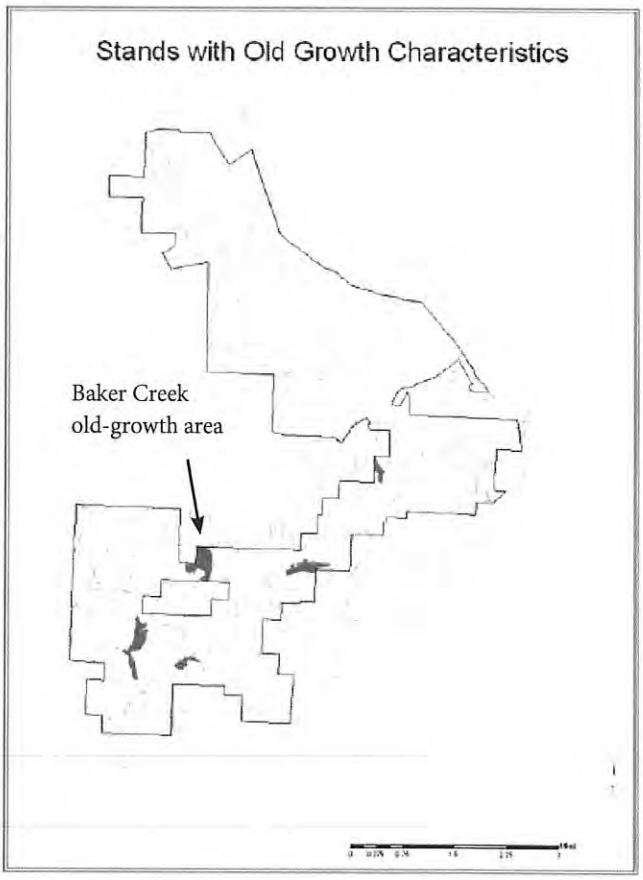


Figure 4. This map (file dated 2/27/2004) was prepared for the 2005 plan revision. These stands (including the Baker Creek old growth) have old-growth characteristics and were proposed for inclusion in the old-growth reserves, but there was not faculty consensus to include them.

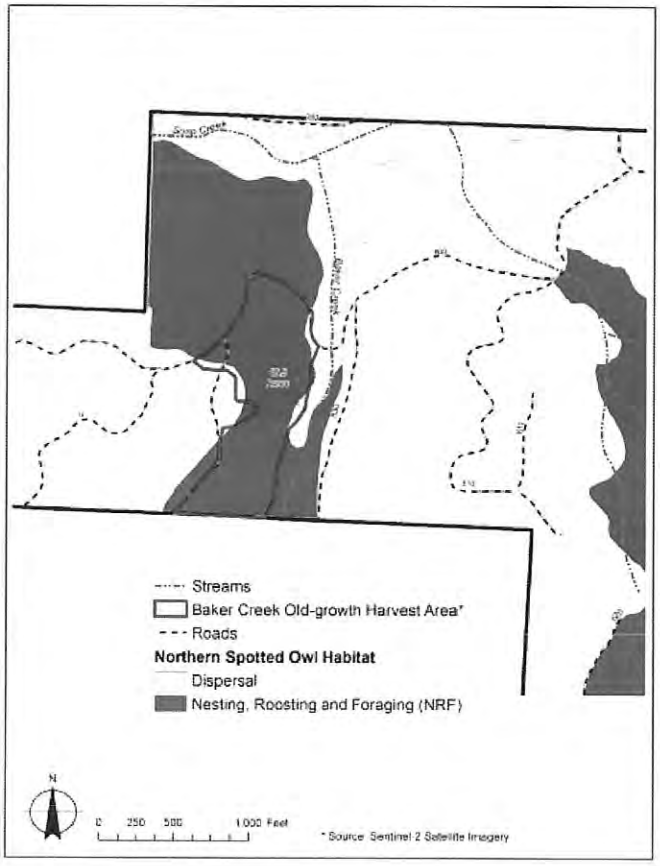


Figure 5. Almost all of the Baker Creek harvest area was within nesting, roosting, and foraging (NRF) habitat for the northern spotted owl.

The justification for cutting the old-growth area was that "Based on recent evidence of a decline in stand health, this harvest was intended to regenerate the stand into a timber-generating future condition" (Appendix 1). From an ecological sense, though, the stand was healthy. Yes, occasional trees die in old-growth forests; that is part of a natural process and is ecologically beneficial, especially to improve their use as NRF habitat. We found no major peril to the future of this stand (see Figure 6).

Thus, clearcutting the Baker Creek old-growth stand (Figures 7 and 8) was not consistent with (and is not permitted under) the 2005 McDonald-Dunn Plan.

2. **Recent Clearcuts in the Structurally Diverse Complex Forest Area.** Clearcuts have been completed during the last three years in the portion of the South Zone devoted to "Structurally Diverse Complex Forest for Multi-resource Outcomes" (Figures 9 to 12). Approximately 166 of the 257 acres harvested were in NRF. The NRF acres might have been available for light understory thinning if that would maintain NRF, but not for clearcutting. The acres outside of NRF would be available for harvest that met the zone goal to maintain or develop structurally complex forest, but not for clearcutting because the plan calls for "one- to four-acre group-selection harvests" to achieve diverse complex forest for multi-resource outcomes.

   Beyond the impact of the acreage of NRF habitat that was cut, placement of the harvest units has fragmented the remaining NRF habitat, potentially decreasing its usefulness for late-successional species.

Thus, the 12 recent clearcuts in the South Zone managed under Theme #4, both inside and outside of NRF, are not consistent with (and are not permitted under) the 2005 McDonald-Dunn Plan.

A Climate-change Mitigation Strategy Would Protect NRF Forests

The harvest of NRF stands, especially the Baker Creek old-growth stand, also works against climate-change mitigation strategies advocated by former College of Forestry Dean Thomas Maness. Mature and old-growth forests in this region are world-renowned for their ability to store large amounts of carbon and their retention is the foundation of climate-change mitigation in forests. As Dean Maness argued in his 2009 article in the Journal of Forestry: "protection of the carbon stock in existing natural forest should be the central management objective related to carbon" (p. 119), "harvesting mature forests to replace them with fast growing stands is not a climate-change mitigation strategy" and "harvesting mature forests results in immediate large emissions that may take decades or even centuries to gain back" (p. 121).

In summary, the 13 clearcuts described here in the South Zone, which cover approximately 250 acres, damaged many important ecological resources, and work against climate-change mitigation. These clearcuts would not have occurred if the 2005 Forest Plan had been followed.

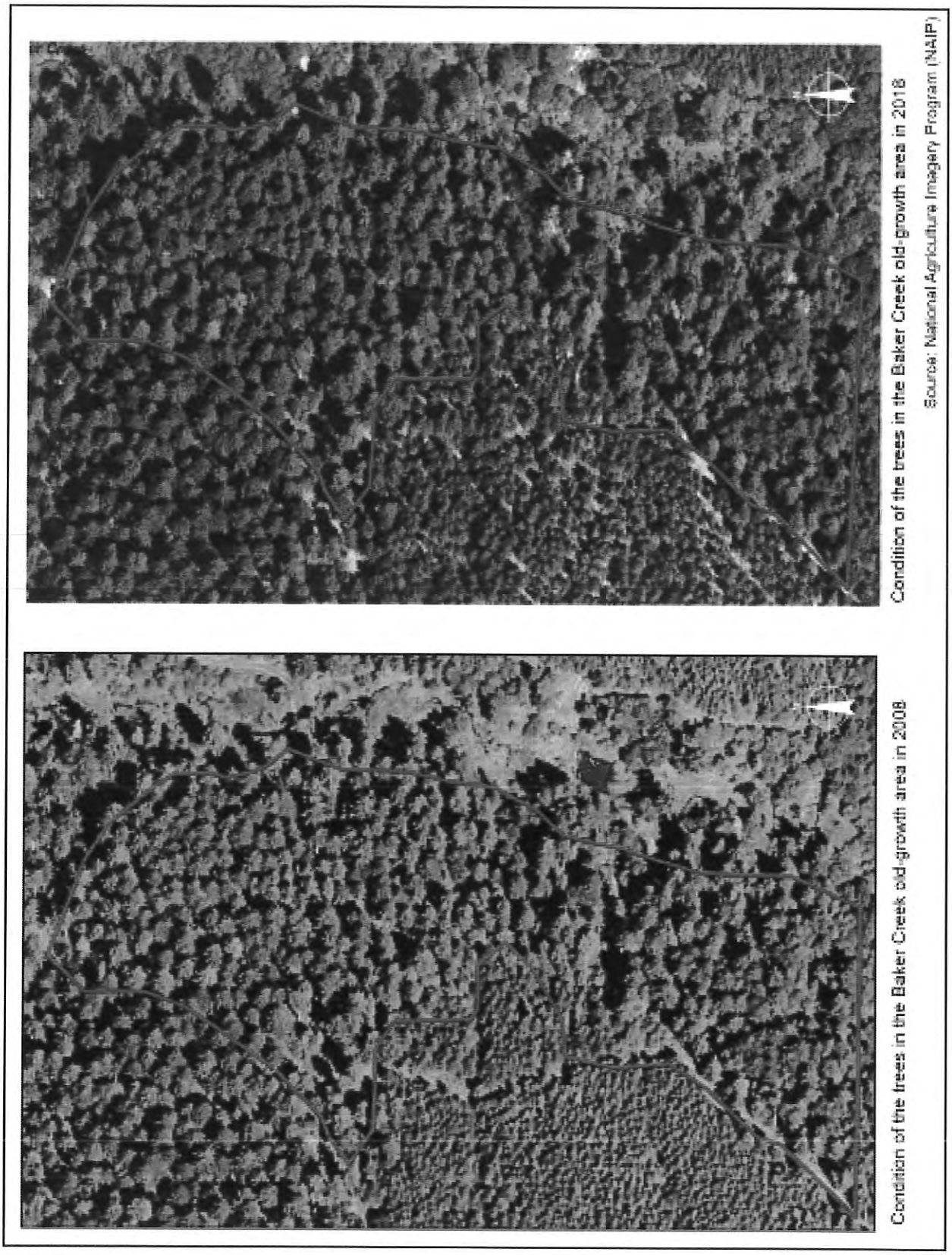


Figure 6. Orthophotographs of the Baker Creek clearcut area before harvest in 2008 and 2018. The 2018 image shows a few trees that died since 2008, but there is no evidence of wide-spread mortality. Dead trees (especially large ones) provide important wildlife habitat both while they are standing, and when they fall to the ground.

Figure 7. Baker Creek old-growth: Top and lower left: Old-growth trees in the remaining portion of the Baker Creek old-growth stand. Bottom right: the Baker Creek log aged 420-years-old ready to be loaded onto a log truck.

Figure 8. Baker Creek old-growth destruction.

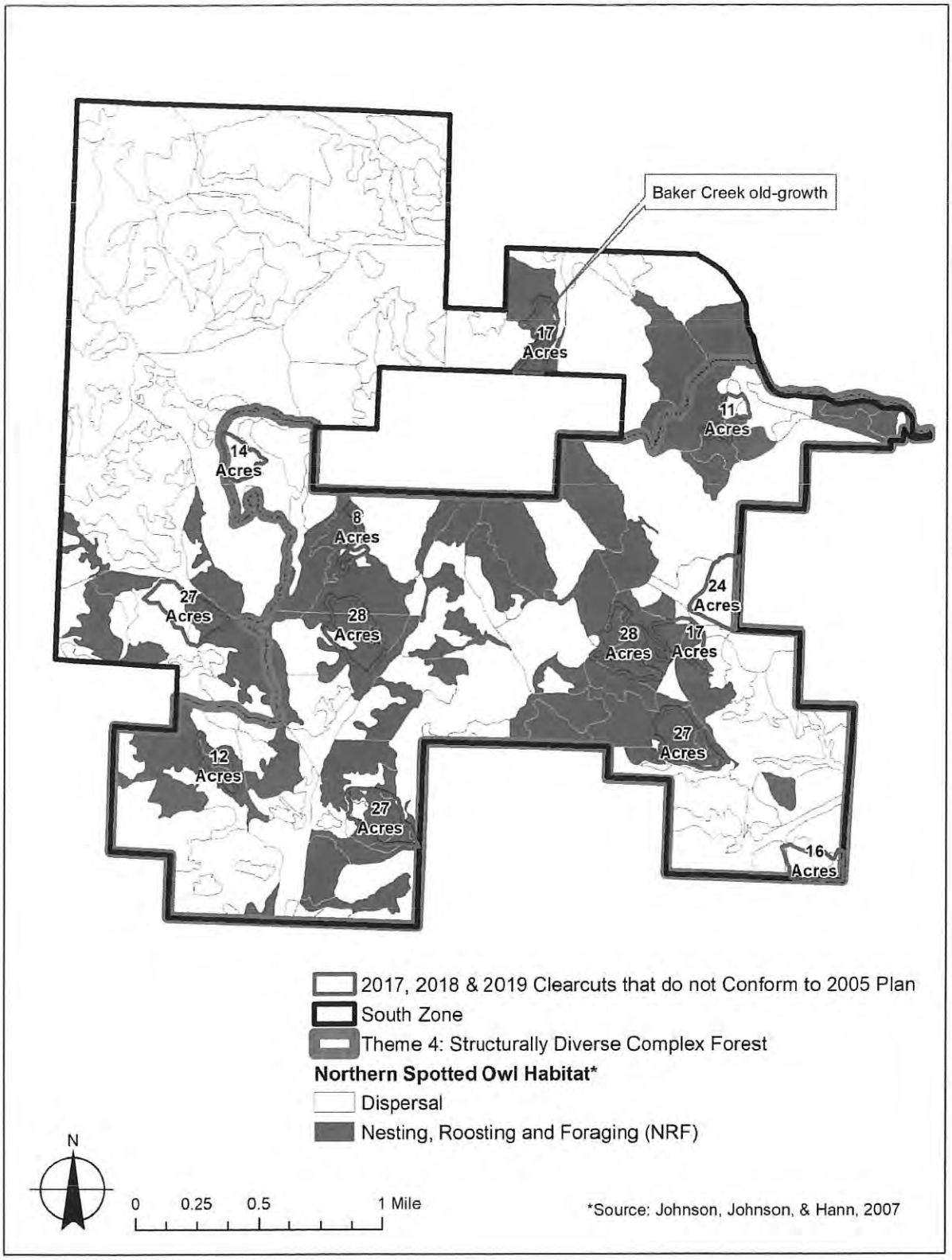


Figure 9. Map of clearcuts completed between 2017 and 2019 in the South Zone that do not conform to the 2005 McDonald-Dunn Forest Plan. They include the Baker Creek old-growth harvest area, and stands within the structurally diverse, complex forest (within the green line) where harvest was limited to one- to four-acre group selection units. Under the 2005 Forest Plan, none of the stands should have been clearcut because either they were in NRF and/or structurally complex forest.

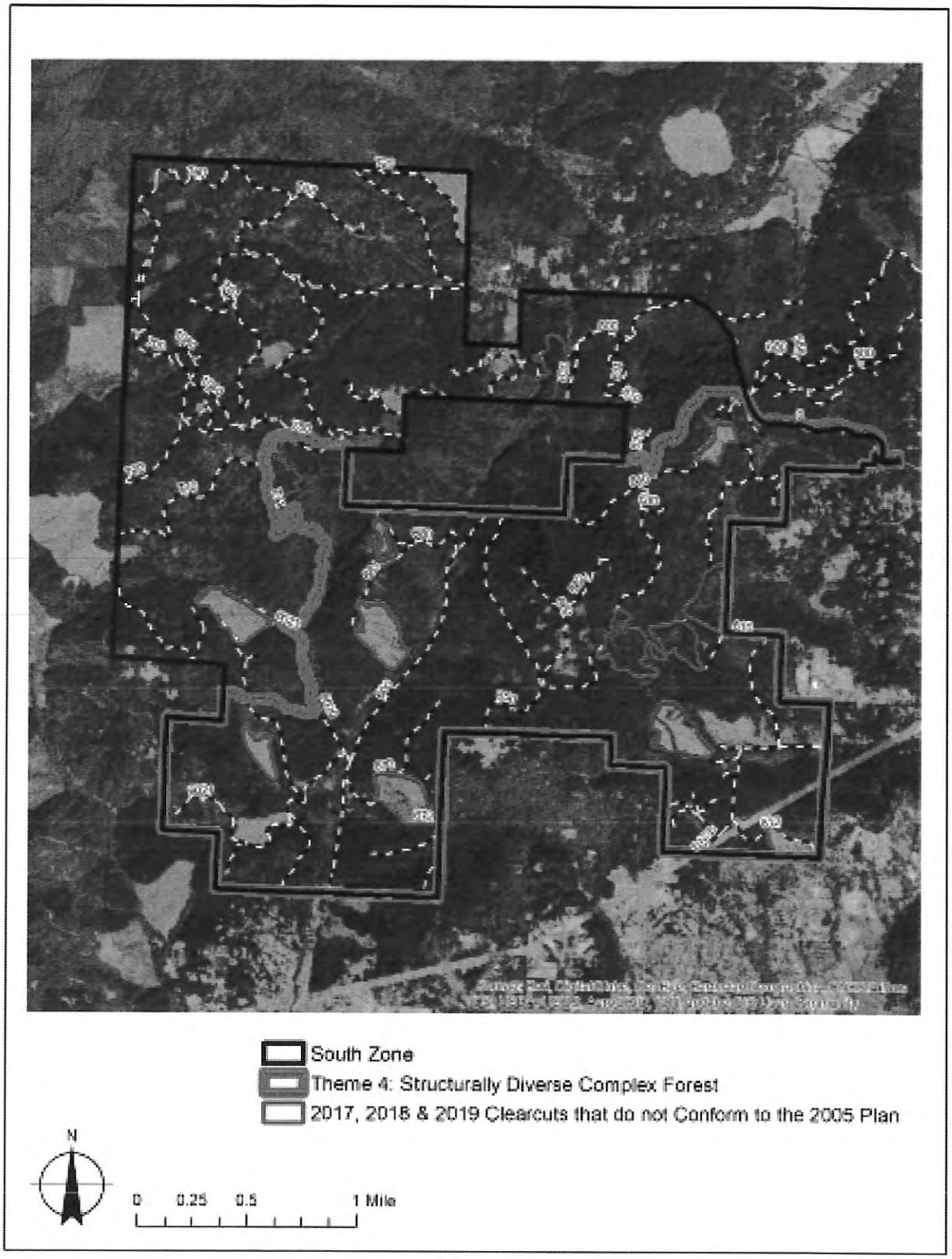


Figure 10. Orthophoto of clearcuts completed between 2017 and 2019 in the South Zone that do not conform to the 2005 McDonald-Dunn Forest Plan. (Note: some were clearcut after the orthophoto was taken.)

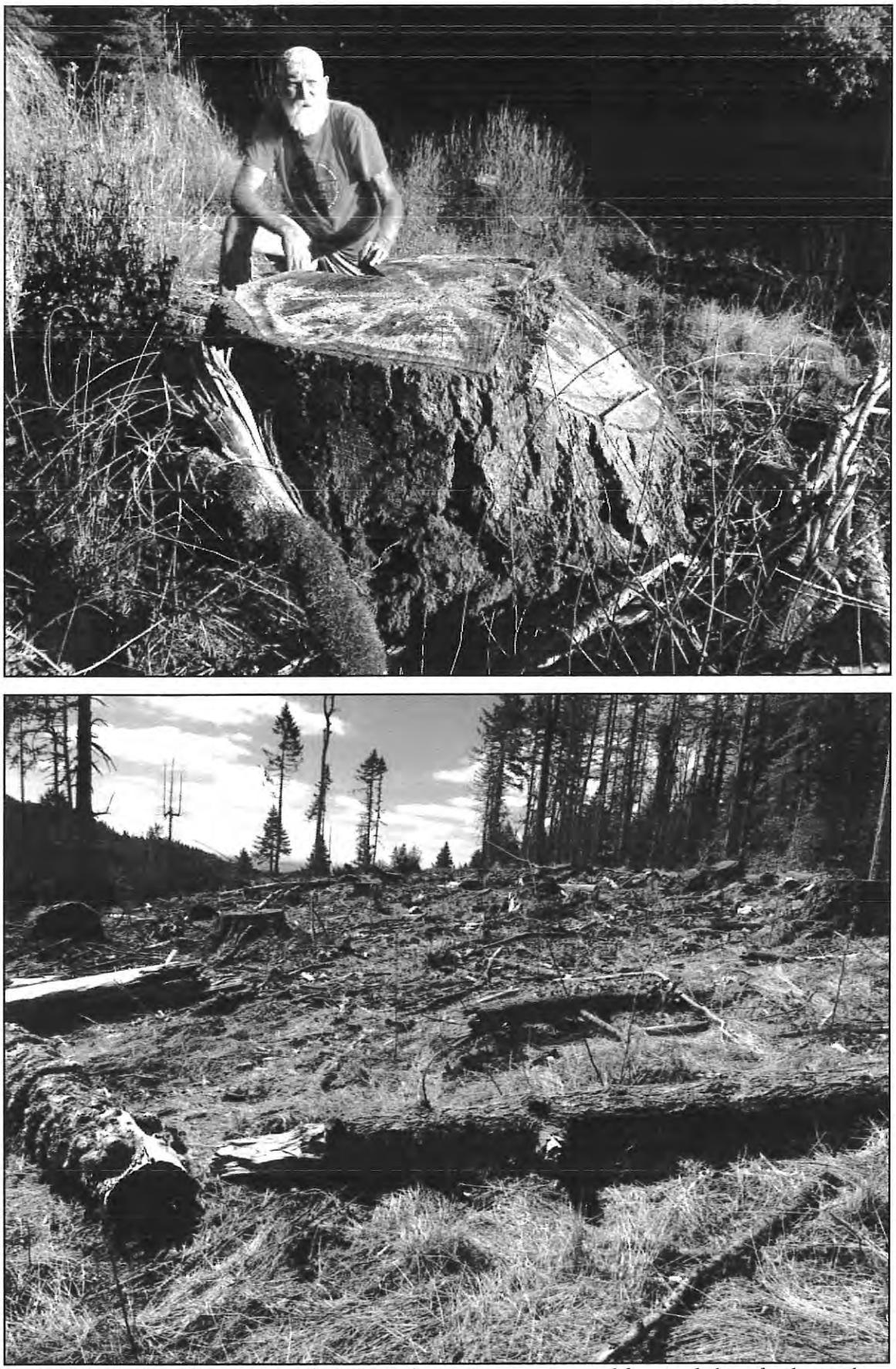


Figure 11. South Zone Harvest in stands designated as nesting, roosting, and foraging habitat for the northern spotted owl: Clearcutting is not allowed in these stands under the 2005 Forest Plan.

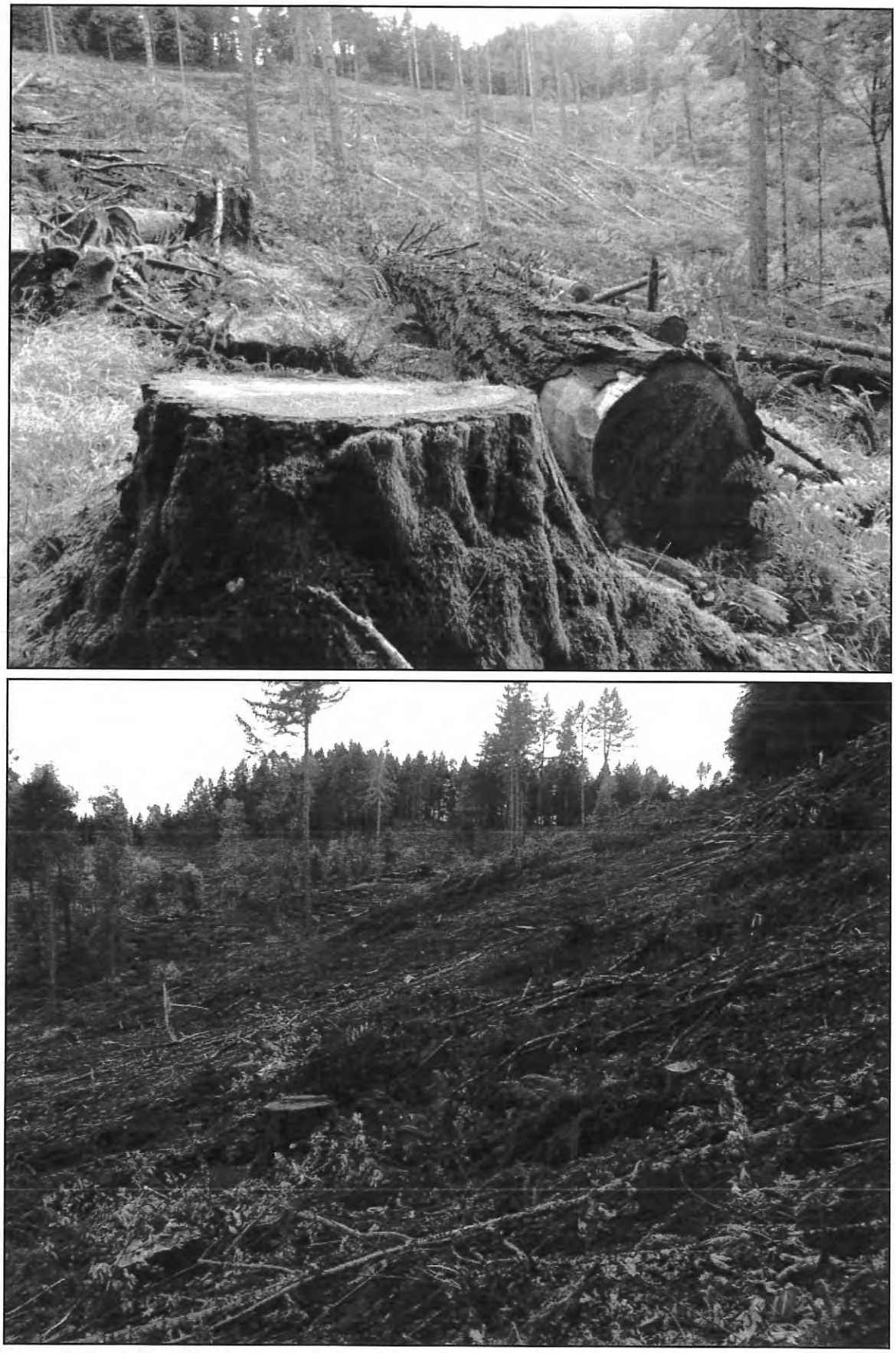


Figure 12. South Zone Harvest in stands designated as nesting, roosting, and foraging habitat for the northern spotted owl: Clearcutting is not allowed in these stands under the 2005 Forest Plan.

Discussion and Recommendations

Pressures for revenue from the College of Forestry's Research Forests are unrelenting. There is always a faculty member who needs seed money for some new research idea that will turn the scientific world on end, or needs funds to implement a new approach to teaching, or needs grant money for a trip around the world to visit other universities. Sometimes money is needed to fund a new building. Most monies that come into the College are restricted to certain uses. On the other hand, harvest revenues from the Research Forests are unrestricted--they can be used for any purpose that the Dean and the FEC think worthy. Thus, they are highly coveted. That will not change. Given the fiscal pressures, it is extremely important to have protective standards in forest plans to prevent the forests from being raided for revenue when the next crisis hits, and to have oversight and review to ensure that the standards are followed. Toward that end, we make a number of recommendations below.

The demand for funds should not jeopardize the integrity of the forest

"I realize that the College of Forestry needs the revenues from harvesting to support its teaching and research programs. The forest funds the College: that's the argument that we all keep hearing, over and over again. But there's a circularity to this repeated claim. The assumption seems to be that current teaching and research programs need to be funded at just the same rate forever—that all the research and teaching should be funded—that the purpose and value of these programs, as well as their quantity and cost, are simply given, unavailable for argument and review. As far as I'm concerned, everything is up for grabs. If we decide to fund fewer research projects, we can fund fewer research projects. Research shouldn't jeopardize the integrity of this forest. The revenue needed for programs shouldn't lead to harvesting that would undermine or compromise just those ecological values we ought to be teaching and researching."

—from Edge Effects by Chris Anderson, 1993.

The problems outlined in this report will not be solved by waiting for a new plan. Why wouldn't we expect the same disregard for a new plan, as we have seen in recent actions on the McDonald-Dunn Forest relative to the 2005 plan? The College first needs to prove that it can responsibly follow a forest plan--the one it has now.

Toward that end, the College should immediately take the following steps:

- Commit to following the 2005 McDonald-Dunn Forest Plan until a new plan is completed, including zone themes and guidance in that plan, augmented by the Dean Davis's important commitment in his 8/12/19 statement to protect trees over 160 years of age during this period.
- Add all of the candidate old-growth stands that were identified in 2004 to the reserves (see Figure 4).
- Create a working group to quickly develop guidelines for identifying trees over 160 years of age on the McDonald-Dunn, including Douglas-fir, grand fir, oak, madrone, maple, and yew. Test those guidelines over the next year as timber sales are developed and harvested; report on the performance of those guides.
- Hold a public meeting each year to describe the proposed forest management activities for the year and how they will meet the themes and guidance in the plan and the Dean's commitments. Also, put this information out on the McDonald-Dunn website and hold a public tour for those who wish to see the sites and discuss the proposed actions.
- Summarize and make public each year the actions that were undertaken over the previous year and how they reflect the themes and guidance in the forest plan. Hold a public tour each year to show people what has been accomplished.

In addition, the College needs to make sure that its managers and staff are committed to understanding and implementing the protection and restoration of the key ecological resources identified in the 2005 plan and the Dean's statement on 8/12/19. Forestry succeeds when managers have the flexibility to tailor their prescriptions to

the infinite variety of sites they encounter in the forest. However, that only works if the managers identify with the goals, themes, and guidance in the plan designed to achieve the mission set for the forest they manage.

The mission for the McDonald-Dunn Forest set 25-years ago still rings true today: to provide a biologically diverse and sustainable teaching, research and demonstration forest with a management focus. If managers of the McDonald-Dunn Forest see trees only as board feet, create tree farms whenever they harvest, and view old-growth conifers and hardwoods solely as obstacles to timber production, that mission will not be successful. Until Research Forest managers demonstrate they understand that the many ecological resources of the McDonald-Dunn Forest have value too, and manage forests in ways that reflect this perspective, the College of Forestry will not regain public trust.

Literature Cited

Anderson, C. 1993. Edge effects: Notes from an Oregon forest. University of Iowa Press, Iowa City. 185 pages.

Bettinger, P., D.L. Johnson, K.N. Johnson. 2003. Spatial forest plan development with ecological and economic goals. Ecological Modelling 169, 215-236.

Davis, R. July 26, 2019. 'Majestic' Douglas fir stood for 420 years. Then Oregon State University foresters cut it down. The Oregonian.

Johnson, D.L., K. N. Johnson, D.W. Hann. 2007. The importance of forest stand-level inventory to sustain multiple forest values in the presence of endangered species, in K.M. Reynolds, A.J. Thompson, M. Köhl, M.A. Shannon, D. Ray & K. Rennolls (Eds.) Sustainable forestry: from monitoring and modelling to knowledge management & policy science (pp. 238-256). Oxfordshire, UK: CABI.

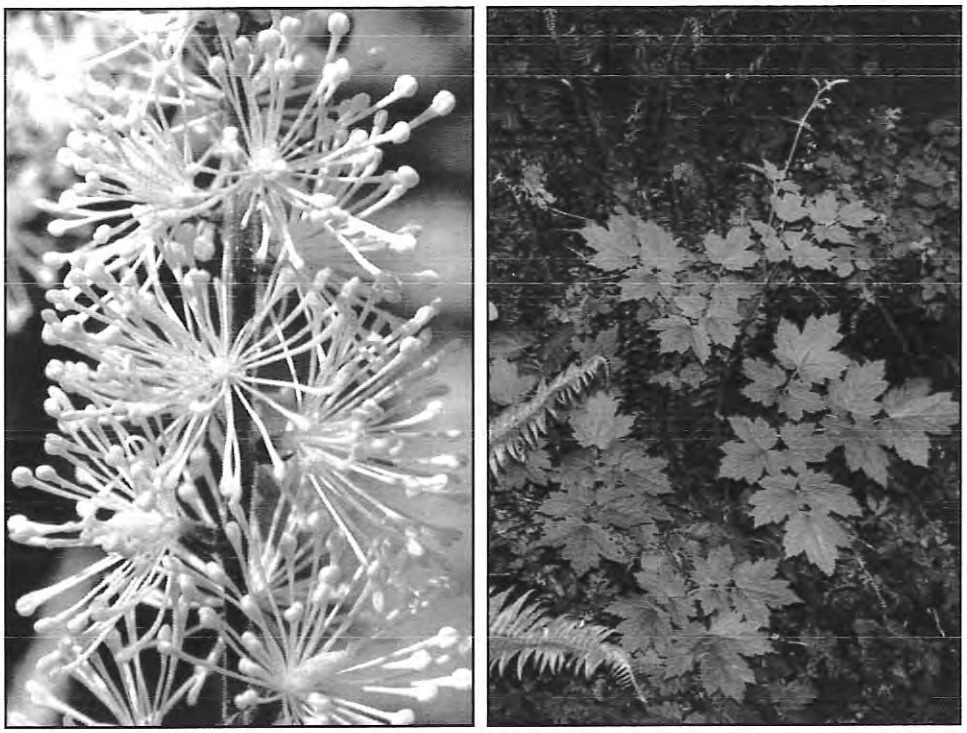
Legacy Oaks Task Force & Prairie Task Force. 2008. Restoring Oregon white oak and native prairie habitats in McDonald-Dunn forest. Available online at: https://cf.forestry.oregonstate.edu/sites/default/files/Oak-Prairie_recommendations_Mar3-2008.pdf 45 pages.

Maness, T.C. 2019. Forest management and climate change mitigation: Good policy requires careful thought. Journal of Forestry (107)3, 119-124.

OSU College of Forestry. 1994. McDonald-Dunn Research Forest plan: Guiding tomorrow's forestry through research, teaching, and demonstration. Pamphlet published by the College of Forestry and distributed to the public. 12 pages.

OSU College of Forestry, 2000. McDonald Forest: South Zone habitat conservation plan, Draft. 41 pages.

OSU College of Forestry, 2005. McDonald-Dunn Forest plan. Available online at: https://cf.forestry.oregonstate.edu/our-forests/mcdonald-dunn-forest-plan. 68 pages.



Tall bugbane (*Cimicifuga elata*) is a rare plant on the McDonald-Dunn Forest associated with old, moist forests. It is considered endangered by the Washington Natural Heritage Program (1997) and the Oregon Natural Heritage Information Center (ONHP 2001), and is a Species of Concern with the US Fish and Wildlife Service.

Baker Creek old-growth logs.

Appendix 1: Letter from Interim Dean Anthony Davis

Oregon State University
College of Forestry

Office of the Dean
Oregon State University
109 Richardson Hall
Corvallis, Oregon 97331

P 541-737-1585
forestry.oregonstate.edu

7/12/2019

Dear College of Forestry Community,

The College of Forestry has significantly benefitted from the multiple-value management of the Oregon State University Research Forests. In addition to timber revenue, which has supported College faculty, staff, students and facilities, these research forests have been home to countless teaching, extension, research and community activities across many generations.

Multiple-value management plans have guided the operations of these forests for years. For example, the McDonald and Dunn Forests use the 2005 Forest Plan (which was developed by an interdisciplinary team within the College) as the basis for decision-making, although the plan was informally suspended in 2009 during the economic downturn. A new plan is under development, beginning with a comprehensive forestry inventory and a consultant-driven strategic process that incorporates all of the College's forests.

Recently, the College harvested a 15.6-acre unit within the McDonald Forest. The predominantly Douglas-fir stand had an origin date of 1759 with pre-harvest estimates indicating tree ages between 80 and 260 years. Based on recent evidence of a decline in stand health, this harvest was intended to regenerate the stand into a timber-generating future condition and included the retention of approximately six legacy trees per acre for habitat purposes.

While operating with the best of intentions and within the guidance of the 2005 Forest Plan, we made a mistake in carrying out this recent harvest. The harvest included trees with ages close to the origin of the stand and one that has been determined to be approximately 420 years old. Although harvest revenue supports critical College of Forestry operations, the future research and ecological benefit of these older trees should have been considered before the harvest was scheduled.

This harvest identifies a serious shortcoming in the College's current forest management practices. While the College maintains around 350 acres of mature reserves within its own forests that are intended to provide older stands for conservation, growth, study, monitoring change and aesthetics, we do not have guidelines for forest age class distributions outside of those reserve tracts.

The College will begin to address these matters immediately by enacting a preliminary suite of measures until the new comprehensive forest plan can address such matters more fully. This includes ceasing harvest of trees older than 160 years, an age identified as significant in the 2005 Forest Plan in the designation of reserve units.

On its own, this action is not enough to build an enduring, diverse, suite of tree age classes. As a result, I am directing the College's Research Forests team to immediately begin to develop actionable strategies to retain individual older trees and continue to broaden the age class distribution within the McDonald and Dunn forests. This increases the potential for these forests to grow large trees that are several centuries old. By doing so, we will expand our capacity for research across a more extensive array of age classes into the distant future.

With these changes, the College of Forestry will emerge with a management process that fosters the protection of current older trees and stands, as well as a plan to grow future old trees and forests. It is our responsibility to pass along to future generations a legacy of age classes that have been stewarded

effectively to date. This will lead to a diverse forest structure that will benefit the College's teaching, research, and extension missions, while also serving as a source of habitat, recreation and other non-timber uses embedded as part of a working forest landscape that also provides revenue to support the College.

This action will result in a reduction in timber revenue, however, it will also demonstrate our College's values and the balance we seek to achieve between timber revenue and the non-timber value of older trees and stands. To support this transition, we will begin a process that will explore the establishment of conservation easements to support the expansion of the College's forest reserve tracts. Adding non-timber revenue can be an essential source of funds that will allow us to continue to deliver transformative education, lifelong learning and informative research programs.

As I mentioned, our team already has been -- and will continue to work on -- updating the College's forest plan. This work will result in long-term guidance and an investment in operations that will continue to build on the College's already strong principles of transparency and engagement. To be clear, the immediate and unequivocal measures described here are preliminary, and will be in effect until a new forest plan is complete. This planning process will allow for appropriate consultation and engagement across varied expertise and stakeholder sectors. We also must continually assess and engage in dialogue around how our forests support the College's mission and research, teaching, extension activity, facilities and general financial support.

The core themes identified in the 2005 Forest Plan still ring true today. Going forward, while aided by that plan, we have been presented with an opportunity to update our management practices to better align with our core values as we seek to continue to define the practice of contemporary sustainable forestry.

The research forests wide range of age classes across trees, stands and forests is a testament to past and present management practices. The deliberate articulation of our objectives for future forest conditions will only strengthen the College's ability to conduct vital research, transformative teaching, and effective outreach into the future.

In summary, I and the College's Research Forests team agree that harvesting this stand did not align with the College's values. Moving forward, we have learned from this matter. Within the College, OSU and the state of Oregon, we are fortunate to work and collaborate in an environment that promotes dialogue, listening, learning and progress. We embrace continuous improvement, and we are often able to do so by willingly assessing our impact and questioning the 'why' of our actions.

You can expect regular updates on next steps. As always, I am available for your questions and input.

Sincerely,

Anthony S. Davis, PhD
Interim Dean
Oregon State University

Appendix 2: Signature page from the 2005 McDonald-Dunn Forest Plan

Forestry Executive Committee Signature Page

Recommended

May 2, 2005
Date

5/3/05
Date

5/3/05
Date

5/3/05
Date

5-3-05
Date

5/3/05
Date

5/3/05
Date

5/3/05
Date

5-3-05
Date

5/3/05
Date

5-3-05
Date

Approved

May 3, 2005
Date

320 Central Avenue Suite 312
PO Box 611
Coos Bay, OR 97420
(541) 267 – 2046
coastrangeforestwatch@gmail.com
www.coastrangeforestwatch.org

October 23, 2019

To:

Vicki Walker, Department of State Lands
775 Summer St. NE, Suite 100
Salem, OR 97301-1279

CC:

Geoff Huntington, Oregon State University
College of Forestry, 140 Peavy Hall
3100 SW Jefferson Way
Corvallis, OR 97333

Paul Henson, US Department of the Interior, Fish and Wildlife Service
Oregon Fish and Wildlife Office
2600 SE 98th Ave, Suite 100
Portland, OR 97266

Kim Kratz, United States Department of Commerce, National Oceanic and Atmospheric Administration
National Marine Fisheries Service, West Coast Region
1201 NE Lloyd Boulevard, Suite 1100
Portland, OR 97232

Dear Ms. Walker,

We are writing to deliver concerns, questions and requests regarding the development of a plan for the Elliott State Forest that came out of a collaborative discussion of local conservation and recreation groups held in Coos Bay this month. All of these groups have invested in the Elliott State Forest in various ways over the years and will be impacted by whatever outcome is determined. As the future of the Elliott State Forest is being discussed at length by the Department of State Lands, Oregon State University, and the Elliott Advisory Committee, it is apparent that the local voice has been largely left out of the conversation and that highly invested local groups and community members have not been adequately represented as partners in this process.

This conservation collaborative is comprised of local organizations and individuals that are stakeholders in the Elliott State Forest and represent conservation values. The groups involved represent diverse environmental and forest management perspectives, and so "conservation" in this context is defined broadly to include recreation interests, public values, and ecological and natural resource concerns including watershed health, biodiversity, sustainability, and fish and wildlife habitat. We met to discuss and identify common values, concerns, and questions that we feel must be considered by the DSL and OSU as

they move forward with developing a Habitat Conservation Plan and management models for the Elliott as a university research forest, outlined below.

Concerns:

- Existing data, knowledge, research and planning efforts of local conservation organizations have not been integrated in OSU's planning or modeling
- Draft plans lack the capacity for adaptive management (e.g. ability/willingness to change management practices in the case of resulting natural resource decline)
- Restoration and conservation planning is not integrated throughout the forest
- HCP process is also lacking engagement of local knowledge
- A situation in which a private entity would hold title to the lands seems unnecessarily complicated for in terms of decision-making, organizational transparency and public accountability. Additionally, non-public ownership of the Elliott would be very concerning to many regional residents

Questions:

- How (on what basis) are management areas being chosen, and why?
    - For example, from a fish conservation perspective -- clarification is needed for the identified conservation areas as they relate to coho salmon habitat (eg – Tenmile watershed, identified for conservation, is lake rearing driven - while dense anchor habitat streams on the East side of the forest are going to be impacted by management)
- How does OSU define "conservation, production, livelihood" in the context of their "overarching research question"?
- Is OSU planning to collaborate with local recreation groups who are willing to help develop a recreational plan that is tailored to the area?
- What is the HCP timeline, and when will this process incorporate local input?
- Regarding the research questions and experimental design being used by OSU – How will you be advancing scientific forestry knowledge?
    - How will the proposed research be different from forestry research that has already been conducted? What new questions will be answered with the proposed experimental design, and to what benefit? What research is out there that has already answered these questions being asked? What questions remain to be more fully answered?
- What research exceptions would OSU be seeking and why?

Requests:

- Local groups be engaged in deciding management and conservation areas

- Incorporate data from local conservation groups (in particular, Coos Watershed Association) and current T&E species data (e.g. Marbled murrelet data from Dr. Kim Nelson at OSU) into decisions about conservation areas for HCP and OSU management models

- We would like to see some different models of experiment designs and management that incorporate ecology more integrally, as opposed to the current watershed boundary draft proposal (For example – a model that shows management of only nonnative/less than 100 yr old stands, among others)

- The DSL should post complete meeting minutes, materials, and presentations from Elliott Advisory Committee meetings for public viewing on the DSL Elliott State Forest web page

As you can likely deduce from the above, an overarching theme that arose in this discussion was that local groups, whose extensive knowledge, effort, and resources could greatly benefit both the planning process and future forest management, are not being engaged by OSU's planning efforts or in the HCP development. Consequently, we have not seen a draft plan that addresses research and management from a primarily ecological basis. No matter where you stand on the "environmental spectrum" it is undeniable that the Elliott State Forest supports threatened ecosystems and species in a way that is unique among coast range forests. This current "ecological baseline" must be acknowledged, and research questions and experiments should be designed to minimize impacts. Many of the local groups engaged in this collaborative discussion would be very supportive of research that reinforces ecological and public use values, rather than place these values at risk for the sake of the experiment.

We are hopeful that delivering this unified community message will enable more meaningful engagement than has been possible to date. We are committed to working with the DSL and OSU to develop a plan for the Elliott State Forest, and look forward to hearing from you.

Sincerely,

Teresa Bird
Co-director, Coast Range Forest Watch

List of attendees to the collaborative discussion includes (but is not limited to):

Coast Range Forest Watch
Wild Rivers Coast Mountain Bike Association
Trout Unlimited, local chapter
Surfrider, local chapter
Backcountry Hunters and Anglers

COOS Watershed Association
Improving the Health of Our Watershed

P.O. Box 388
Coos Bay, OR 97420
www.cooswatershed.org
(541) 888-5922
cooswa@cooswatershed.org

November 14, 2019

Dear Vicki Walker (Department of State Lands) and Geoff Huntington (Oregon State University)

The Coos Watershed Association (CoosWA) thanks you for the opportunity to share input on the Elliott State Forest (ESF), its future management and its ongoing value to our organization and community.
CoosWA is a nonprofit organization established by diverse stakeholders in 1993 to help landowners and communities work together to develop, test and implement management practices that improve watershed health. It is always our goal to support environmental integrity and economic stability. Our organization has partnered with the ESF landowners to collect data, conduct research and implement restoration projects on Common School Fund (CSF) lands since our association began. We sincerely look forward to continuing this positive work with whomever becomes the new owner.

We estimate that our organization, along with our partners, have invested nearly $10 million in data collection and restoration work on the ESF preserving and enhancing these critical habitats. We want this work to continue. CSF lands within the ESF are ecologically critical to the health of the Coos Watershed and the many species that depend on its function. The Coos basin contains 48% of the ESF (44% CSF lands) and 95 miles of fish-bearing streams running through the Forest, making it the highest density basin of fish streams within the Elliott. Additionally, the Coos basin contains more than half of the habitat for Endangered Species Act listed coho in the entire ESF. This area includes the upper Haynes inlet tributaries (Palouse and Larson Creeks) and Upper West Fork Millicoma sub basins, which are two of the highest salmon producing basins on the entire Oregon coast. In addition, the Upper West Fork Millicoma has some of the best water quality in the Coos basin.

We want Oregon State University and consultants working on the HCP and research plan to use the comprehensive data CoosWA has collected and ensure that future management practices are compatible with the vital resources CoosWA's instream and riparian projects have restored and enhanced. Below is a list of the data we have collected that we are providing to you (via electronic drive).

- **Aquatic habitat inventory data** - uses ODFW protocols for the portions of streams in the Elliott that drain to the Coos Watershed, totaling more than 60 miles.
- **ODFW coho life cycle monitoring data** - uses ODFW protocols (2008-current).
- **West Fork Millicoma restoration monitoring** - engineered log jam effectiveness monitoring for juvenile salmonids (2011-2015).
- **Summer temperature monitoring data** - from 2003-2008 for Larson Creek, 2003-present for Palouse Creek and 2010-2017 for West Fork Millicoma
- **Stream gauge data** - We currently operate stream gauges on the West Fork Millicoma and Marlow Creek with data back to 2002.
- **Coho spawning surveys** – uses ODFW protocols for the West Fork Millicoma, Elk, Palouse, Larson, and Marlow Creeks since early 2000's.
- **Road inventory and sediment reduction plan** – uses GRAIP protocols for all 245 miles of ESF roads within the Coos Watershed.

In planning for the future, our organization brought together stakeholders in 2015, including the Oregon Department of State Lands and the Oregon Department of Forestry, to identify and prioritize approximately $10 million dollars of future restoration work to be completed in the Elliott. We are also in the process of completing a Coho Strategic Action plan for the Coos basin and some high priority projects have been identified on ESF land. Our organization is anxious to begin implementing this critical work with the new landowner.

As shown through our past collaboration and investments, and future restoration plans, CoosWA is committed to an ecologically and economically healthy future for the Elliott. We hope that you will use our data, restoration information and planning documents as you move forward with the HCP and research proposal. Please reach out to us if we can be of any assistance or provide more information and support.

Sincerely

Haley Lutz

Haley Lutz
Executive Director, Coos Watershed Association
hlutz@cooswatershed.org or 541-888-5922 x 302

CC: Oregon State Land Board, Elliott State Research Forest Advisory Committee, Senator Arnie Roblan, Representative Caddy McKeown, Senator Dallas Heard, Representative David Brock-Smith and Coos County Commissioners Melissa Cribbins, John Sweet and Bob Main

OFFICE OF THE SECRETARY OF STATE

BEV CLARNO
SECRETARY OF STATE

A. RICHARD VIAL
DEPUTY SECRETARY OF STATE

Bev Clarno
SECRETARY OF STATE

900 COURT STREET NE, SUITE 136
SALEM, OREGON 97310
(503) 986-1500

September 11, 2019

Vicki Walker
Director of the Department of State Lands
775 Summer St. NE, Suite 100
Salem, OR 97301-1279

To the members of the:

Elliott State Forest Research Advisory Committee

As the Secretary of state and a voting member of the state Land Board, I am writing to express my sincere desire to ensure that the Elliott Forest is maintained as a key asset of the state and managed in a way to maximize the contribution of resources to the common school fund.

I remain concerned that the OSU proposal may not be the optimal way to accomplish maximizing the return on the Forest, and also have concerns that the OSU long term management may result in a continued burden rather than having the asset be generating revenue for the children of our state.

If in fact OSU is unsuccessful in managing the forest in a sustainable fashion, knowing the revenue source of covering a potential shortfall should be determined in advance.

The consideration of a lease with a county or counties, the tribes, or a private company does not seem to have been considered or explored after the Lone Rock deal terminated. I hope that we do not regret failing to consider all possibilities.

Maximizing the revenue to the common school fund for our children is paramount, but I am also very interested in knowing that we have done all we can to maximize the long term benefit to local communities, counties and tribes that have an economic interest in the Elliott.

Bev Clarno
SECRETARY OF STATE

I am reluctant to transfer ownership of an asset that was entrusted for the benefit of Oregon's children since the 1930's. I am extremely concerned about policy decisions like the proposed decoupling resulting in a deepening of the Urban/Rural divide.

I have every hope that the committee will be thorough in considering all of the implications of the OSU proposal. Asking tough questions is the most important part of the job for a group like yours.

Thank you for your willingness to serve.

Respectfully,

Secretary of State Bev Clarno

Tobias Read
Oregon State Treasurer

OREGON STATE TREASURY

September 24, 2019

Director Walker and Members of the Elliott State Forest Research Advisory Committee,

As I write this letter, students from around the world are protesting government inaction on addressing climate change. This is a fitting backdrop to your work in finding a consensus on moving forward to resolve the underlying tension that remain on the Elliott. On the one hand, it is an asset of the Common School Fund with a legacy of producing significant revenue and tens of millions of board feet in lumber; on the other hand, it is a public jewel of 82,000 acres of critical habitat for a number of threatened and endangered species, a source of recreation and enjoyment for outdoor enthusiasts, and a potential resource for Oregon's efforts to address climate change and resilience.

The source of this tension is clear: the Elliott's status as Common School Fund asset means that it is managed by the State Land Board according to fiduciary standards and DOJ advice with the sole objective of producing revenue for the Fund's beneficiaries—the state's K-12 system and its school children—and not for its ecological or recreational attributes. Ultimately, I believe the only way to resolve this tension is through a full decoupling of the Elliott from the Common School Fund. At the same time, Oregonians have been resounding in their feedback, and the State Land Board has fully affirmed, that the Elliott remain public.

I remain optimistic that the most likely path forward on the Elliott is to transform it into a state research forest. Keeping the Elliott in the Common School Fund will lead primarily to further litigation and acrimony, and will represent a lost opportunity to strive for something bigger. Accordingly, I have believed for some time that Oregon State University and its College of Forestry is best positioned to operate, manage, and/or own the Elliott on behalf of all Oregonians.

No institution is perfect; mistakes get made. OSU's recent harvesting of old growth on their McDonald Dunn forest in Corvallis was shortsighted and a deviation from their goal of being seen as responsible stewards in their local community. I told them it was a mistake, one I described as tragic. At the same time, I have faith in their commitment to learn from the experience, and address it moving forward. Clearly, they have work to do to rebuild trust with their local community and citizens across Oregon.

I'm proud of the advisory committee's work. To date, members have worked in good faith and collaboration to sketch out a vision for the future of the Elliott. Thank you.

Treasurer's Office - Capitol
900 Court Street NE, Room 159
Salem, OR 97301-3896
503.378.4329

Main Office
350 Winter Street, Suite 100
Salem, OR 97301-3896
503.378.4000

oregon.gov/treasury
oregon.treasurer@state.or.us

The committee's mission, as outlined by the State Land Board, was clear—find a path to transform the Elliott into a state research forest, and keep three overarching goals in mind: continued public ownership, a full decoupling in order to compensate the Common School Fund, and the assurance of strong conservation measures and public access for recreation and enjoyment. In the coming months, the committee will work to finalize this vision and answer a number of unresolved questions. I'd like to draw the committee's attention to a few that will determine how broadly embraced the vision will be.

First, governance and accountability. Trust and goodwill, while critical to moving forward, are not sufficient for ensuring that the Elliott is managed in a way that is consistent with future management plans and broader public expectations. Conservation measures need to be enforced, and the research mandate of the forest must be protected. This might entail the use of outside entities that are empowered to enforce agreed-to measures. The advisory committee should carefully consider governance and oversight structures that will ensure that the Elliott will always be managed for research and conservation, and that it will not be harvested to support broader university operations.

Second, climate change and carbon. Dean Anthony Davis, in his presentation to the State Land Board, nicely captured this potential: climate change poses significant challenges and questions for the state, and as such requires a large and significant research agenda. The Elliott can help provide some of those solutions and answers. The research agenda must be robust enough to incorporate a broad cross-section of related questions, not just active forest management related research. Further, my hope is that the advisory committee and relevant parties will aggressively explore the potential of carbon credits and conservation capital as critical components of any financing mechanism.

Finally, tribal involvement. Whenever the state engages in discussions around trust lands, and the future of public lands in general, we should actively and meaningfully consult our tribal partners. I look forward to learning more from the Advisory committee about ways in which an Elliott state research forest will involve tribal partnerships.

Again, thank you for your hard work on the advisory committee. I remain optimistic that this is a unique opportunity to protect critical habitat for wild salmon along our coast, enhance protections for old-growth on this landscape, increase recreational access for local residents and tourists, provide a research agenda that will benefit rural communities and help the state prepare for and address the impacts of climate change, raise the profile of OSU's premier College of Forestry, and allow the State Land Board to meet its constitutional obligations.

Sincerely,

Tobias Read