



Sierra to California All-Lands Enhancement (SCALE) In-person Meeting
April 14, 2016, Sacramento, CA

Meeting Synopsis:

On April 14th, 2016, the Sierra Institute facilitated a meeting among five USFS Collaborative forestry groups from across California and several USFS Region 5 staff for a semi-annual SCALE meeting. The day began with group updates, as well as discussion of key barriers, challenges, and future plans. Sierra Institute and USFS Region 5 then presented the key findings and recommendations of their [Defining Local](#) and [Local Contracting](#) white papers. To conclude the meeting, attendees discussed how SCALE could best support the Collaboratives moving forward.

Meeting Attendees

Alfort Belin	Ann Grasso	Luna Latimer
Juliana Birkhoff	Rob Griffith	Teresa McClung
Cathy Koos Breazeal	Will Harling	Mark Metcalfe
Jennifer Chapman	Steve Haze	Erica Nevins
Reuben Childress	Sherry Hazelhurst	John Owen
Diana Craig	John Heissenbittel	Jodie Pixley
Amanda Cundiff	Jeanne Higgins	Mary Sketch
Sheri Elliott	Rick Hopson	Pierce Tucker
Allison Jolley	Brooke Huffman	Robin Wall
Jonathan Kusel	Marilyn Ladd	Steve Wilensky
	Sarah LaPlante	Genny Wilson

Action Items

- [Sierra Institute](#) will look into the Greenhouse Gas Reduction Fund and the Air Resources Board.
- [P. Tucker](#) and [A. Jolley](#) will be in touch regarding scheduling site visits.
- [Sierra Institute](#) invite leads from the fire MOU to give a short briefing at the next SCALE meeting; Mark Metcalfe to assist in coordination.
- [Sierra Institute](#) organize a subcommittee on this Air issue
- [All](#) are invited to contact [Juliana Birkhoff](#) if you are interested in attending the Dinkey's Air Quality Symposium.
- [Sierra Institute](#) to explore avenues of collecting and distributing links and resources from individual Collaboratives.
- [Sierra Institute](#) to share the CHIPS radio program with other groups.

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Meeting Notes:

I. Collaborative Updates and Group Discussion

A. Amador-Calaveras Consensus Group (ACCG) —Teresa McClung and Robin Wall

Summary:

- Much of the work in the ACCG area is related to the Butte fire, such as erosion control. They also are responding to tree mortality, especially as it relates to bug kill.
- ACCG works with the Bureau of Land Management (BLM) on restoring the Mokelumne watershed.
- ACCG has spent a lot of time trying to hire local workers. Using the Sustained Yield Management Act, they now have an agreement between Calaveras Healthy Impact Product Solutions (CHIPS), the BLM, the Bureau of Indian Affairs (BIA), and the Washoe Tribe to put local people to work.
- The group has identified a list of priorities moving forward, with a broad focus on tree mortality. They are trying to communicate that Amador and Calaveras counties are two of the “critical counties” in the Governor’s proclamation.
- Locally, they have compelled Amador and Calaveras Counties to declare states of emergency and establish tree mortality task forces.

- ACCG has also been working on a Master Stewardship Agreement between the Eldorado and Stanislaus Forests for the Upper Mokelumne River Watershed.

Discussion:

- J.Kusel: ACCG has done great work. Are there barriers that you've encountered?
 - S. Wilensky: We've faced huge barriers with PG&E and SB1122 in establishing power plants that will use biomass. Mills are being shut down because of costs. We need to be putting pressure on decision makers.
 - J. Heisenbuttel: This is a problem across California. We are losing an outlet for biomass that we need to restore forest health.
 - S. Hazelhurst: as part of the Governor's task force, there are a lot of people working on the issue. There probably won't be a solution in the next 6 months but perhaps in the next year. The more people that can contribute to that conversation and offer creative ideas, the better.
- Collaborative Member: There has been some level of communication between the Governor's office and the Secretary. We are on the ground and we know the magnitude of the problem, but we are still behind the curve. Fire seasons have been devastating, and it feels like our efforts aren't necessarily responded to.
- S. Wilensky: Another major obstacle is working with federal and state agencies on private land, even in emergencies.

B. Burney-Hat Creek (BHC) Community Forest and Watershed Group (BHC)—Ann Grasso

Summary:

- The Burney-Hat Creek area suffered from severe fires in 2014. Now, they struggle to get rid of burned biomass. Other projects (i.e. Burney Gardens) are at a standstill because of this issue.
- The BHC Collaborative project area spans 370,000 acres. 62% of the land is government-owned, including state and local governments. A significant amount of forested land is privately owned. The group is currently exploring how to take an all-lands approach with such a large amount of private land.
- In September, the group signed an Agreement with Sierra Institute for facilitation services. The Collaborative was on a pause before that. Getting everyone back in action has been challenging; for example, the monitoring group is just getting back up to speed.
- The group is considering projects related to meadow restoration, the massive bug kill, trail and road development, and the Route 89 corridor. These places are where there is high social/economic value for both the Forest and the communities. The Collaborative includes a Resource Conservation District, CAL FIRE, and Sierra Nevada Conservancy.
- They've signed a Master Stewardship Agreement with the Pit River Tribe and are also thinking about expanding the Collaborative area.
- The group is excited about a Youth Conservation Corp that will be working in the area.

Discussion:

- Collaborative Member: Is the Forest or District interested in expanding, or did the Collaborative want to expand?
 - A. Grasso: It came from the District and Forest.
- Collaborative Member: Who are the non USFS stakeholders?
 - A. Grasso: National Park Service, State Park, Sierra Pacific Industries, Fruit Growers Supply Company, BLM, PG&E, private contractors, environmental groups, and Resource Conservation Districts.
- Collaborative Member: Is membership open or set?
 - J. Kusel: Anyone can walk in, but when it comes to formal decisions, there is a certain list of people that can vote.
- Collaborative Member: Can you expand on issues with your local biomass plant?
 - A. Grasso: The lease between the local plant (Burney Forest Power) and PG&E is on the chopping block. We have no shortage of fuel supply.

C. Dinkey CFLR—Sarah LaPlante

Summary:

- The Dinkey Collaborative has hired a new facilitator, Juliana Birkhoff, who is being brought up to speed.
- The collaborative has a number of workgroups: Socioeconomic Monitoring, Fire Policy, Communication, Ecological Monitoring, Cultural Burney, and Finance to name a few.
- Dinkey CFLR is 5 years old and has ebbs and flows that reflect people's interests.
- In March, the Collaborative hosted a Monitoring Symposium. Attendees reflected on the results of the monitoring plan and how their approach or strategy could be adapted using data gathered.
- The Collaborative has also hired the Sierra Institute to do socioeconomic monitoring. Similar to ecological monitoring, the group hopes to collect baseline measures to see how the projects are progressing.
- In the past few months, the group lost an important member because the Wilderness Society has decided to stop participating in USFS Collaboratives, nationally.
- Justine Reynolds has been hired to manage the Dinkey's communication and community outreach and hopes this increases outreach efforts.
- A Fire Policy Work Group has been established to address tree mortality and drought implications for the forest. They are attempting to engage the Air Quality Control District and seeking a partnership for public health, air quality, and forest health.
- Sierra National Forest (SNF) is at the epicenter of the mortality event. The collaborative is focusing on restoration of general forest. SNF has to balance USFS's infrastructure improvement projects with the Collaborative's goals for forest health.

Discussion:

- 50-60% of SNF is dead; mortality is creeping up in elevation and is expected to go on for 10 or more years. Drought, fire exclusion, climate change, and bug kills have created a perfect storm.
- Collaborative Member: I think Dinkey Creek is well positioned to go beyond the Charter mandate and to affect people outside the collaborative.

- Collaborative Member: How is mortality changing discussions and what actions you are taking?
 - S. LaPlante: Our current restoration project is a green project. We have a two-day meeting in May to discuss next steps.

D. Southfork of the American River Cohesive Wildfire Strategy (SOFAR) Update—Jennifer Chapman,

[\[J. Chapman's PowerPoint\]](#)

Summary

- Challenges of the collaborative:
 - High number of stakeholders.
 - Remaining transparent and nonexclusive. Due to time, not everyone can be interviewed. Due to Office of Management and Budget restrictions, interview questions cannot necessarily be shared.
 - There is a timeline tension between developing a treatment strategy and projects while also involving diverse types of stakeholders.
 - It is a challenge and important to clarify evolving expectations.
 - Joint NEPA and CEQA documentation is still “unpolished.”
 - Utilizing the Good Neighbor Authority and Wyden Amendment is on the horizon; SOFAR is unpacking what do these authorities mean and how the group can use them.
- S. Hazelhurst: Good Neighbor Authority came about with the Farm Bill. USFS can work with CAL FIRE, Department of Natural Resources, and state agencies. Like other Agreements, partners can specify what is being brought to the table; partners can share time, people, money, and/or materials.
- Wyden Amendment gives USFS authority to share financial resources with partners where there is a direct benefit to the National Forest.
- SOFAR’s collaborative design process is as follows:
 1. Select facilitator
 2. Clarify focus and project intent
 3. Adapt stakeholder assessment questions
 4. Stakeholder assessment (30 interviews) with individuals (kept anonymous); organizations and questions will be published in a draft.
 5. Publish findings report
 6. Host public workshop
 7. Design collaborative process
- Example assessment questions: How do you envision or describe forest policy for the future? Given that there are so many different values, how should we go about setting priorities? What issues would a successful collaborative project address? How would you recommend structuring public and stakeholder involvement?

[\[W. Harling's PowerPoint\]](#)

Summary:

- The WKRP project area overlaps with the Karuk ancestral boundary, and is comprised of mostly federal land with some private ownership. Stakeholders in the area want to bring historical fire patterns back to the landscape. In 2004, their Fire Safe Council first embraced prescribed fire, supporting a culture of burning.
- Coho and Chinook Salmon population health is tied to forest health.
- Fire behavior has changed dramatically in the area. Burns span from creeks all the way up to ridges.
- Group Structure:
 - WKRP developed shared values that act as sideboards for the group.
 - The group established “Zones of Agreement” (both geographic and conceptual).
 - Traditional Ecological Knowledge is on equal footing with western science.
 - They practice community shared ownership with a diversity of partners.
- Challenges
 - Security of funding.
 - The project area/community is isolated.
 - The group must work across three national forests.
 - There is agreement to treating a place but consensus on treatment is more complicated.
 - At times, USFS resources and perspectives conflict with WKRP’s ideas.

Discussion:

- S. Wilensky: How are you navigating Air Quality?
 - W. Harling: It is our biggest issue. We need to be burning 500 acres/year to return to historical forest patterns. The group is currently doing 60 acres a year but had to shut down because of the air quality district.
- S. Hazelhurst: What does capacity mean for you? Which areas would be most helpful in terms of capacity building?
 - W. Harling: There are so few people in our communities, we struggle to get enough bodies and housing to do the needed work. Even if we could get contractors, where would they stay? If people are going to invest, the project needs long term sustainability. Right now, we do three year grants; no one would buy a house with those odds.

II. Brainstorm of Key Issues

J. Kusel

Highlighted key challenges and issues of interest:

- Unpacking and implementing USFS authorities is of interest. Example: The groups desire clarity on how Wyden and Good Neighbor Authority will play out in the context of Collaboratives.

- Groups are still in need of resources and more “how to” on joint CEQA/NEPA documentation.
- Stakeholder diversity, and at times conflict, presents inherent challenges.
- OMB regulations/timeline challenges are delaying newer Collaboratives.

Group brainstorm of critical issues:

- The group is focused on saving existing value-added infrastructure and then building additional, smaller scale infrastructure throughout the state.
- Connecting the environmental benefits of restoration to downstream users is critical to the success of this movement.
- Volunteer and in-kind effort is perhaps not sustainable. In these Collaboratives, there is often a burden on non-agency collaborative members.
- Moving from project work to landscape-scale work and understanding how to identify monitoring needs is of great interest.
- These groups are in need of best practices regarding how to recruit and maintain important individuals in the group.
- There is also a need to prioritize avoided cost strategies that tie into air and water savings.
- There is frustration around rejected proposals for carbon funds.
- Single species management can at times conflict with fire goals.

III. Local Contracting

Sierra Institute and Region 5

[[A. Jolley's PowerPoint](#)]

Introduction

- Thank you to P. Tucker, M. Ladd, and S. Elliott for their efforts on these papers.
- S. Elliot: We've been working on this paper for a while. Preferencing local contracting is not a new authority, but we want to improve how it is utilized. In this study, we first consider definitions of local and how local contracting reflects triple bottom line values—ecological, economic, and social. This paper is a tool that people, specifically USFS employees, can use to navigate local contracting.
- Under the USFS Regional Forester, R5 has distributed [Defining Local](#) and [Local Contracting](#) papers as a means to show our intent to use these tools and distribute documents beyond the Collaboratives. These principles apply to all Collaboratives, not just these groups. There is support in the region under the highest leadership, as seen in Randy Moore's recent letter.

Case Study Example: Burney-Hat Creek

- Similar to the methods used with the other case studies, Sierra Institute traveled to Burney and conducted interviews to understand what “local” means to Collaborative members.

- They compared their interview responses with existing literature regarding “local” in the context of natural resources.
- Next, Sierra Institute used GIS to visualize boundaries that were incorporated in the community, such as watersheds, school districts, and Census data. Two tiers of local were developed, the first tier of communities were those areas tied most closely to the landscape.
- Sierra Institute also examined USFS contracting data and created maps showing the frequency, value, and distribution of contracts.
- Sierra Institute recommend that local contractors be given preferences if they meet certain criteria of local. Specifically, Sierra Institute recommends that points be assigned as follows:

Variable	Threshold	Points Relative to 1 st Tier	Points Relative to 2 nd Tier	Points Relative to 3 rd Tier
Location	Headquarters are within	3	2	1
Employees, including subcontractors	50%+	3	2	1
Other Socioeconomic Contributions (Local supplies, biobased-fuels, employment training, local philanthropy)	Narrative	5	3	1

Local Contracting Flow Chart

- P. Tucker has been working on local contracting issue for two years.
- On the chart (see Appendix A), green areas are where the Collaboratives can contribute. Blue portions are in the USFS Contracting Officers’ realm.
- Types of federal acquisitions:
 1. Agreements
 2. Procurement instruments
- One of the most important areas for Collaboratives to contribute is in project and program planning. Collaborative members know how to best define the scope of work/treatment areas, as well as which local contractors might be best suited to do the work.
- USFS will work with Collaboratives on their local delineations, which is an important first step in elaborating the scope of work.
- Contracting Officers ask initial contracting questions: Is it a declared emergency? What set-asides are appropriate? Is additional market research required?

- S. Elliott: We are hoping that Collaboratives won't try to do the Contracting Officer's "job" rather that they will examine the Defining Local resource, confirm the delineations that make most sense for them so that the Contracting Officer can then apply that definition to all contracts.
- Tools:
 - Simplified acquisitions are used often for commercial services and have a \$150,000 threshold.
 - Open-market standalone contracts are often used for construction contracts.
 - Indefinite Delivery Indefinite Quantity (IDIQ) is used when there is an anticipated repeated need for work of a similar nature; task orders fall under IDIQ.
 - Blanket Purchase Agreements (BPAs) are used with a single vendor, for profit.
 - These tools are described in further detail in the Local Contracting paper.
- Agreements:
 - The term "agreement" means that no money is obligated or bound to a contractor.
 - L. Latimer: If agreements are the preferred relationship in the instance of tribes and other groups like nonprofits, why is the focus on contracting?
 - USFS personnel: USFS can do contracts under agreements, too, but under certain authorities. Agreements are a type of partnership, so the partner and USFS must come up with a match. There are instances that contracts are the appropriate appropriations mechanism.
 - S. Wilensky: Where does the Stafford Act fit in? Or is it separate?
 - P. Tucker: It is a separate tool. For the most part, it uses federally appropriated funds.
- Evaluation process:
 - USFS tends to use best value evaluation.
 - Lowest Price Technically Acceptable is when "the bar" is set regarding what is acceptable and among those that meet that standard, the lowest bid wins.
 - Trade-off: Contracting Officer (CO) goes through a more extensive evaluation process and then price is considered.
- The implementation process is as follows: Solicitation, vendor responses, contract award, contract performance, performance evaluation, then adaptive program and iterative project planning.
- Collaborative member: In this chart, where is the Line Officer involved? What about when you set criteria for evaluating best value?
 - The line officer will tell the CO the evaluation criteria of importance in the project description/objectives. There needs to be detailed discussion when you hand off the project between Line Officer and CO (these "handoffs" are shown in the section of the flow-path that changes from green to blue).
- Timeline and Rollout of these resources:
 - Sierra Institute and USFS Contracting officers involved in Local Contracting project will attend collaborative meetings in June and July to unpack this presentation, answer questions, and communicate with USFS district staff.

- In the new fiscal year, the goal is to have a contracting checklist in place for implementation

Discussion

- Collaborative member: Would we have to get materials in by June 1st?
 - P. Tucker: Timeline information was posted last August. Materials needed to be in on January 22nd for anything beyond simplified acquisitions. We are trying to be more flexible and work with projects more proactively. If a Collaborative wants to begin a fairly large project, USFS wants information by October so that all the details are worked out by January and the project can begin in Spring.
- Collaborative member: Our group is averse to contracts. In the past, we developed a project collaboratively, but then the main contractor who won the bid made changes that disregarded tribal values/resources at a project site. This contractor shouldn't be hired anymore, even as a subcontractor. Can we exclude these vendors from subcontracting?
 - M. Ladd: Collaboratives should include all of their knowledge/information about contractors when presenting the Contracting Officer with a project description. Contractors can be rated on their proposed subcontractors, which would take past experience into account.
 - A. Jolley: Collaboratives can submit feedback on past performers but cannot access USFS past performance records.
 - M. Ladd: Through "market research", Contracting Officers can receive feedback on past performance but cannot share or solicit feedback.
- The Sales Administrator is a critical role but separate from this contracting process.
- J.Kusel: To clarify, Collaboratives can still communicate with COs through their Line Officer when a project is in the blue area of the chart.
- A Collaborative member asked if in the project description, they should include a list of contractors that they don't want working in the area (for example, those that have not acted respectfully towards tribes). P. Tucker responded that USFS cannot "blackball" specific contractors, but Collaboratives should provide that information in the project description.
- Collaborative member: The structure of the Collaboratives matter. If all stakeholders are at the table, the groups may not have as many hiccups.
- Collaborative member: It is hard to distill years of interactions or relationships into one document.
- P. Tucker: we are committed to helping these Collaboratives work through this process.

IV. Recap of SCALE Priorities and Next Steps

J. Kusel

Reflections on next steps from the day's discussion:

- **ACTION ITEM:** Sierra Institute will look into the Greenhouse Gas Reduction Fund and the Air Resources Board.

- SCALE groups have made progress in delineating the work of the USFS in relation to the Collaboratives. The group is starting to break down some of the barriers that exist. Region 5 has been, and will continue to be, supportive; they will further address the issue of pace and scale.
- The next step for local contracting is the roadshow. **ACTION ITEM:** [P. Tucker and A. Jolley](#) will be in touch regarding scheduling site visits.
- For rebuilding local economies, the group is moving beyond “should we?” and “how?” to actual implementation.
- It is important for the groups to identify monitoring needs and to implement monitoring plans accordingly. There is an opportunity for all groups to learn from each other’s objectives.

Other Priorities (*all group input*):

- Collaborative Member: We need to take a step back. The mountain ranges and forests have unique features and resources. It is important to frame these resources in terms of valuation. Developing a cost/benefit analysis to show the importance of these assets and determine a real value on the impact of these Collaboratives is needed.
- Collaborative Member: We have to close the gap between the cost of biomass removal/transportation and the compensation for energy/heat. One of the main concerns is maintaining and creating new infrastructure; we cannot invest in the land without investing in the infrastructure.
- USFS Representative: We need to increase the amount of fire on the landscape. This will require working with Air Quality Boards and MOUs with a number of entities that could include fire safe councils, the Environmental Protection Agency, California Air Resources Board, and California Air Pollution Control Officers Association (CAPCOA)
- Project Representative: Is there a value for SCALE to work on air quality regulation issues?
 - Air quality regulation questions:
 - What are the regulatory steps and processes, and at what point can the groups be persuasive?
 - How are the air boards persuaded?
 - Who are the actors, what are the barriers?
- **ACTION ITEM:** [Sierra Institute](#) invite leads from the fire MOU to give a short briefing at the next SCALE meeting; Mark Metcalfe to assist in coordination.
- **ACTION ITEM:** [Sierra Institute](#) organize a subcommittee on this Air issue
- Dinkey Collaborative has agreed to put money and resources towards organizing a symposium for air quality issues **ACTION ITEM:** [All](#) are invited to contact [Juliana Birkhoff](#) if you are interested in attending.
- Collaborative member: Gasoline shortage led to biomass utilization in late 70’s. When the oil market recovered, the subsidy went away and they all shut down. Emergencies can lead to action; how can we utilize our current natural resource emergencies to emphasize the importance of biomass utilization?

- We should share Collaborative groups' agendas/meeting summaries between SCALE groups. **ACTION ITEM:** [Sierra Institute](#) to explore avenues of collecting and distributing links and resources
- **ACTION ITEM:** [Sierra Institute](#) to share the CHIPS radio program with other groups.
- We need to make the connection between upper watersheds and downstream users. SCALE groups should consider developing appropriate economic metrics to communicate to downstream users.
- [US Endowment for Forests and Communities](#) is a good resource for education and public-interest projects.

V. Meeting Evaluation

- As SCALE moves forward, perhaps we should reach out to other Collaboratives.
- Critiques of meeting:
 - Insufficient time (especially for those traveling from far away); consider making it into a two-day meeting or making it shorter and/or making calling-in available.
 - Time keeping was at times too loose and attendees weren't sure how they were doing on time.
 - There was too much background noise coming from the kitchen.
 - Reports/meeting materials should be sent in advance.

Appendix A: Pathway to Service Contract Acquisitions

