

Special Areas and Forest Plan Revision Region 3 Work Group Product

Operational Draft: This document is prepared to provide guidance to Forest Plan revision teams. As this guidance is implemented we expect to learn improved ways to do this work. As we learn we will be updating these documents.

08/01/2006

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Introduction

Special Area recommendations are one of the Forest Plan components and reflect one of the decisions that a Forest Plan contains (FSM 1921.11 – Plan Requirements - based on 36 CFR 219.7(a) (2)). Special areas must be supported by the desired conditions and other plan components developed in the revised forest plans. The Need for Change, conducted during Comprehensive Evaluation (CER Phase I) will also help identify any need for new Special Areas, or for re-designation as a different type of Special Area, or for un-designation of existing Special Areas¹. Any recommendations for designation of new Special Areas may be designated in this revision (36 CFR 2197(a)(2)(v)) as long as long as no site-specific project or activities are approved. Projects or activities would have to be handled in a subsequent site-specific NEPA process. The guidance in this paper is meant to supplement existing FSM and FSH direction. In addition there is Region 3 supplemental information for the consideration of Other Special Areas that a Forest may have identified in their current Forest Plans and/or identifies a need to add to the revised plan.

Current Special Area direction may be found in the following locations:

FSH 1909.12 has many references to Special Areas.

- Chapter 10 – Land Management Plan – Plan components and Proposed and Possible Actions – Section 11.15 – Special Areas
- Chapter 30 – Public Participation and Collaboration – highlighted under Section 31.42 – Participation When Developing Objectives, Special Areas, and Suitability of Areas
- Chapter 60 – Forest Vegetation Resource Planning - Highlights special areas under Section 62.2 – Identification of Lands Generally Suitable for Timber Harvest and Section 62.3 – Identification of Lands Generally Not Suitable for Timber Harvest
- Chapter 70 – Wilderness Evaluation
- Chapter 80 – Wild and Scenic River Evaluation

FSM 1923 – Wilderness Evaluation

FSM 1924 – Wild and Scenic River Evaluation

FSM 2320 – Wilderness

FSM 2354 – Wild and Scenic Rivers

FSM 2360 - Special Interest Areas (focused on Cultural Resources management)

FSM 2370 - Special Recreation Designations - Contains direction for management of these areas, such as those designated by law, administratively, or through the National Registry of National Landmarks

This document is organized to provide a basic understanding of what special areas are and how they fit under the auspices of the 2005 Planning Rule. Existing areas are

¹ It is highly unlikely that Forest Plans would recommend the undesignation of Congressional designations, such as wilderness or wild and Scenic River segments. References to undesignation throughout the remainder of this document are focused on levels below Congress.

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considered first, as they are already established, and planners need to know how to incorporate them into the CER Phases 1 and 2. Second, potentially new special areas, specifically those we are required to consider within the analysis (Wilderness and Wild and Scenic,) are described in this document, including sample methods for documentation, as shown in the appendices. Finally, information is provided for consideration of new other types of designations for special areas. This section is ordered last as it is optional to accomplish with the Forest Plan revision, and should be given consideration during revision only if it will meet the desired conditions, timeline, and budget constraints on each forest. An option is to do some development of new other special areas and clearly communicate that these will be considered in future plan amendments and/or site-specific NEPA documents.

What are Special Areas?

Special areas are places or areas within the National Forest System designated because of their unique or special characteristics (FSM 1905 – Definitions). These designations may occur as a result of Congressional action, through statute, or through separate administrative processes². Existing plans have congressionally designated areas, such as Wilderness or Wild & Scenic Rivers. In addition many Plans have administratively designated special areas, such as developed recreation areas, ski resorts, research natural areas, botanic areas, or geologic areas. These types of designations are listed in Appendix A, along with which level of government has the authority to create or undo those designations. Within the Forest Service policy Appendix A represents the designations known as Special Areas. Each Forest Plan may also have created management areas or other ways of highlighting locations that are not listed in Appendix A, which were or remain special to some portion of our publics.

Special Area Considerations during Forest Plan Revision

The initial review of the existing Forest Plans will identify places on the national forest that are identified as special to some portion of our collaborators or the Forest Service. Each responsible official needs to review these designations. Those designations that are the responsibility of Congress would become part of the final recommendations in the Forest Plan to Congress. Other designations may no longer function for their original intent due to other changes, such as expanding residential development on adjacent lands. How each responsible official chooses to handle these existing designations will be based on the need for change resulting from the Phase I of the CER, and on the desired conditions collaboratively identified during the development of the Proposed Plan (CER Phase II). Another consideration during the need for change evaluations is the information contained in the assessment of Attitudes, Beliefs, and Values toward National Forest System lands and the Socio-Economic Assessments created for each

² These types of designations are listed in Appendix A, along with which level of government has the authority to create or undo those designations

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National Forest in Region 3. These documents will likely contain some information concerning Special Areas within each forest and the region.

Within the revised Forest Plan the Responsible Official should provide appropriate plan components for existing designations and recommended designations. For example Plan components are required for eligible or suitable wild and scenic rivers, recommended wilderness and wilderness study areas. Other special areas in the revised Forest Plan may have area-specific desired conditions, objectives, guidelines, and monitoring guidance in addition to forest-wide direction found elsewhere in the existing forest plan. The responsible official needs to consider whether additional management direction is necessary to protect the resource and therefore warrants the extra effort of maintaining or perhaps creating a new special area. Appendix A has a list of potential special area designations and Appendix B has a list of existing Special Area designations in current Forest Plans.

All special areas should have a discrete boundary that is mapped³. These maps should be made available with the revised forest plan, unless the location is protected by federal laws, such as the Archaeological Resources Protection Act or Federal Cave Resources Protection Act. Such maps may be withheld from the public and made available for agency use only.

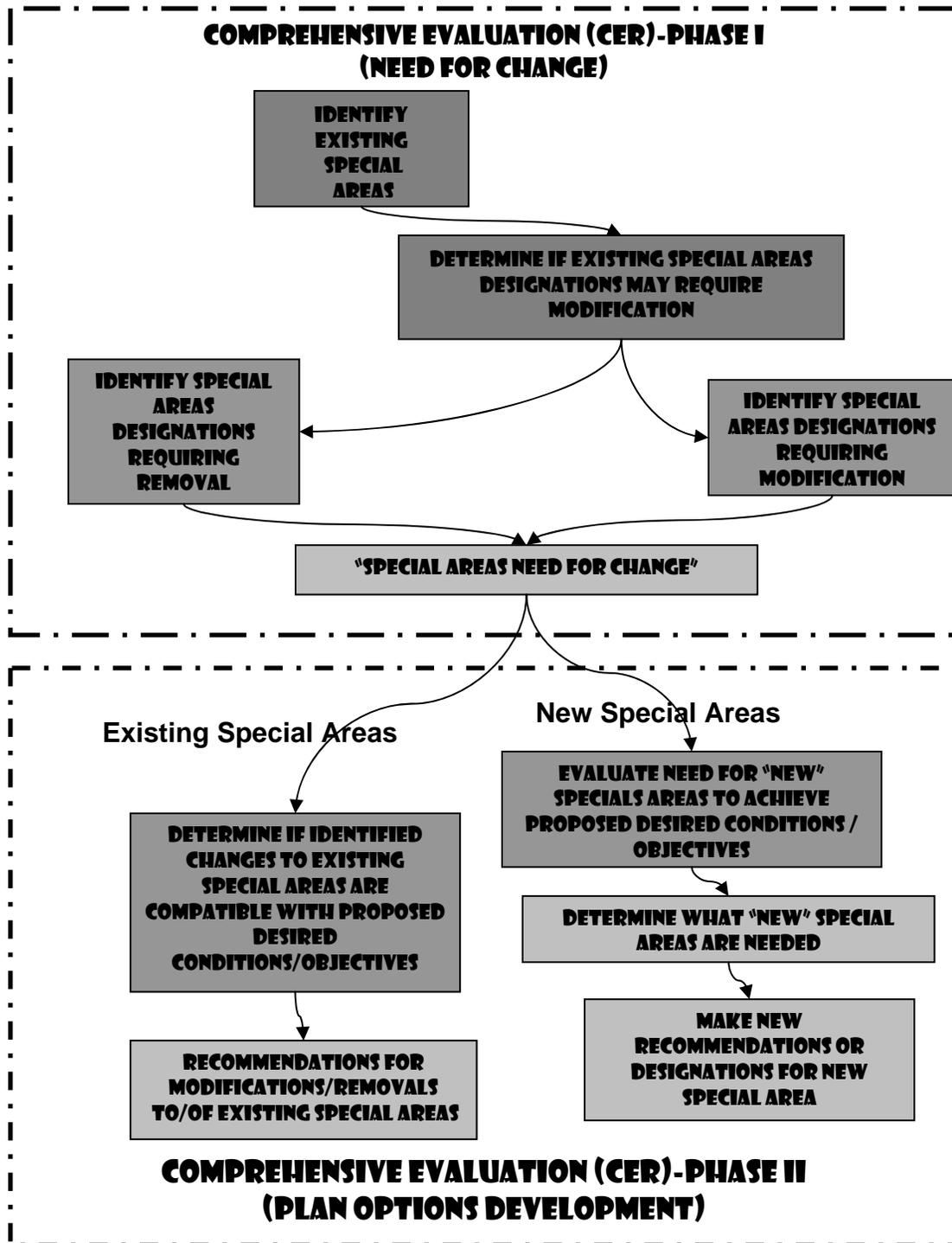
Not all areas which have a current special area designation belong in the special areas section of the Forest Plan. Special areas by definition must have unique or special characteristics for which specific management is required. Some may be more appropriately managed through the Suitability of Areas section or Guidelines in the Forest Plan. In addition, the contrary may also be true of some current Forest Plans. Some areas qualify for Special Area designation in the revised plan may not be clearly identified as a Special Area in the current Forest Plan.

The following flowchart summarizes the process described later in the document.

³ Roads and trails do not make the best boundaries; consider buffering or determining if these locations need to be separate forest plan designations. Using roads/trails can create unintended consequences such as eliminating the ability to do road maintenance and other management activities.

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NEPA and Forest Planning

In the Southwestern Region, it is anticipated that revision of forest plans will be covered under a Categorical Exclusion (CE) versus an EA or EIS. This decision model has many implications for revised plans and future site-specific project planning. Most obvious is that no decisions or recommendations in the Forest Plan can go beyond what is authorized by the CE. Any recommendations for new designations, un-designations, enlargements, or reductions in size may need to be handled in a subsequent NEPA process (if site-specific NEPA is needed) and associated Forest Plan amendment if necessary. However, some designations are within the authority of the Responsible Official (Forest Supervisor) as long as no site-specific projects or activities requiring detailed NEPA analysis are identified in the revised plan during the process completed under the CE (36CFR219.(a)(2)(v)).⁴

There are three general scenarios for the level of designation or recommendation for designation of special areas in this revision process:

- If a separate management plan is required by law, regulation, or policy, that plan must be evaluated by a separate NEPA process, subsequent to the plan revision process. The Forest Plan should include interim direction consistent with the CE to protect unique values. An example would be a Comprehensive River Management Plan for a Wild and Scenic River.
- If there will be no identification of site-specific projects or activities requiring detailed NEPA analysis for new designations, then the CE associated with the plan revision would be sufficient to create the designation and provide other guidance (FSH 1909.12 – 11.15 (2)) such as forest plan components.
- If a special area would benefit from even more specific and detailed management direction, it will be a more appropriate to schedule the analysis for later, after the revised forest plan has been approved. The current revision effort will not focus on such a detailed site-specific analysis. An example could be the enlargement of an existing Botanical Area.

Collaboration

Identifying and determining special areas is a required component of a revised forest plan, and public collaboration must be included in the process. Collaborating from the initial revision stages will build support for the final product and reduce conflict throughout the evaluation process. Whether integrated into a comprehensive public participation plan or treated as a stand-alone process, collaboration should be a primary method for building external and internal support for the identification, evaluation, and recommendations for special areas.

There is a wide variety of collaboration techniques and models for forests to choose from to suit their needs. The Regional Work Group Products for Collaboration may be located on the Regional FSWEB site.⁵ These products will continue to be updated as

⁴ Reference Appendix A for a listing of the current delegations.

⁵ FSWEB location is <http://fswweb.r3.fs.fed.us/eap/nfma/working-group/products/Collaboration/index.shtml>

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management direction changes and new information becomes available. Collaboration activities for special areas should include the following components:

- **Common Understanding of the Process** - It is imperative for all audiences to know and understand the parameters of the process such as the timeline, budget, and scope. Special area recommendation must be supported by the desired conditions and can be accomplished during the plan revision process; however, designation may require subsequent NEPA analysis.
- **External/Internal Audience** - Key people from both internal and external audiences should be identified and included as early in the process as possible. Tribal consultation and the states' coincident roadless petitioning process are two types of activities that require additional attention. This engagement should be continued throughout the revision process.
- **Iterative and Adaptive Process** - From start to finish, ensure that the collaboration process on special areas is providing meaningful and timely opportunities for all audiences to provide input. An adaptive process recognizes that plans may change and provides enough flexibility to allow for future change. For example, don't make an irreversible commitment to provide quarterly newsletters only to find out a year down the road that they don't suit your needs.
- **Action Plan** - A good action plan will provide the collaboration effort with the purpose, direction and motivation needed to accomplish its goals. Who? What? When? Where? Why? Consideration of special areas within the revision collaboration action plan should answer these questions in identifying which activities or processes will be used to meet the intent of forest plan revision.
- **Documentation Strategy** - Collaboration activities for special area evaluations, needs to be reflected as part of the Documentation of the Collaboration Process, part of the Plan Set of Documents⁶.

⁶ See the Plan Set of Documents Guidance: <http://fsweb/eap/nfma/the-r3-way/planning-records/index.shtml>

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Existing Special Areas⁷

As part of the Comprehensive Evaluation Report (CER Phase I), a list of existing Special Area Designations should be assembled. This list, with any accompanying management direction, will provide a baseline for the evaluation of further special area needs on the forest and to inform the public during the collaboration process. Sources for existing special areas may include the current Forest Plan and official designation documents. Review any existing Special Management Areas in the current Forest Plan. Evaluate if they qualify as a Special Area under the current FSH/FSM direction and they are supported by the desired conditions.⁸ If they do not qualify as a Special Area, and the need for management direction is still valid, other plan components should be used to achieve management objectives.

This information should also be used for transition to the revised plan. An evaluation of the current management will determine if there is a need for change in management direction in response to changes in desired conditions, natural or social conditions, including demographic change in the region and the interests of visitors.

If existing special areas do have adequate existing management direction, review to determine what management direction is needed; this task occurs during development of the Proposed Plan (and accompanying CER Phase II). If the recommended management direction does not change the existing land uses; if it meets the desired conditions; and if it can be approved using a CE, then additional NEPA is not required. Implementation of such management would allow these designations to better reflect the characteristics for which they were established or to better meet changed conditions.

Another potential outcome is that a forest may decide an area no longer fits the desired conditions and/or designation applied to it and should be un-designated. If the area is within the designation authority of the Responsible Official, then un-designation may proceed. When authority does not lie with the Responsible Official, but rather a high official or part of government, the forest can only recommend it be un-designated.⁹ In this case, the most appropriate management direction would be to make a recommendation to un-designate the special area to be consistent with the desired condition.

⁷ Appendix B has a list of Special Areas in Region 3; however, this list should be reviewed and updated as needed.

⁸ Appendix A has a more comprehensive list than the FSH 109.12 -11.15 Exhibit 01 upon which it was based. FSM 2370 and 26CFR 295 were used to expand the table.

⁹ Unless delegation of decision authority has occurred subsequent to the original special area designation.

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Creating New Special Areas

These processes address three general types of special areas: Wilderness, Wild and Scenic Rivers, and Other Special Areas. Forests are required to consider the first two during revision. Other special areas may also be considered if the evaluation / collaboration process can meet the revision timelines / budget of the Forest. It is recommended that forests have a strategy for other special area consideration outlined and identify those activities as part of the collaborative process.

If an area is designated by other authorities (e.g. state or local governments), the Responsible Official may choose to establish desired conditions and management direction for these areas or otherwise acknowledge their existence in the revised forest plan.

Wilderness Recommendations¹⁰¹¹

A required part of plan revision during development of the Proposed Plan (and accompanying CER Phase II) is to make recommendations concerning potential new wilderness designations and to create interim management guidance for the protection of wilderness character for these recommended areas. It is possible that there are no portions of the forest that are appropriate for new wilderness recommendation. However, at a minimum the Inventoried Roadless Areas¹² need to be evaluated. Four qualities help define wilderness character: untrammeled, undeveloped, natural, and outstanding opportunities for solitude or a primitive and unconfined type of recreation.¹³ The purpose of this section is to summarize/outline existing guidance and clarify how wilderness inventory and evaluation will coincide with other processes such as NEPA. For a complete and detailed description of all the required and optional steps, please refer to FSH 1909.12 Ch 70, and FSM 1923.

Required Steps

This document summarizes, and in some cases supplements, instructions found in the handbook and the manual. The following steps are required by 36 CFR 219.7 (5)(ii).

Step 1: Review Inventory of Potential Wilderness

¹⁰ The State Petitioning Process under the Inventoried Roadless Area (IRA) Management Rule, and the process described in this document are entirely separate. Under the State Petitioning Process, petitions from the State requesting rule making for management of IRAs are due to the Secretary of Agriculture by 11/13/06. The Secretary of Agriculture has 180 days to respond once the application is complete. IRAs included in a petition should be closely tracked by the Forests to ensure recommendations in the Forest Plan are informed by the petitioning process.

¹¹ The FSH for this topic is still being finalized and adjustments may have to be made to this information after it is available.

¹² Areas are identified on maps at <http://roadless.fs.fed.us/>

¹³ Wilderness Act 1964

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This step is done at the Forest level and involves reviewing the current inventory of potential wildernesses. Forests should start with their existing inventory of Inventoried Roadless Areas (IRAs), Congressionally designated Wilderness Study Areas, and add to that any additional areas that meet the inventory criteria in FSH 1909.12 Chapter 70. Potential wildernesses are referred to as inventoried roadless areas (IRAs).¹⁴ These IRAs are the same as those referred to in the May 13, 2005 State Petitioning Rule for Inventoried Roadless Area Management. Each existing IRA has a name and number, using a number sequence of Region (03), Forest (xx), and area number (001 – 999). Additional new IRAs proposed internally or through collaboration during plan revision will also need to have identification numbers assigned if there any identified.

If through collaboration, the public brings forward an area that does not meet the criteria for the inventory in its current management condition, it should not be added to the inventory¹⁵.

Step 2: Evaluate Potential Wilderness

This involves three steps: determining capability, availability, and need.

- a) Capability – This evaluates how well the area meets the definition of wilderness. This evaluation is done at the forest level.
- b) Availability – This evaluates the value of and need for wilderness compared to the value and need for other resources. This evaluation is done at the forest level.
- c) Need – This evaluates the contribution of potential wilderness to the overall National Wilderness Preservation System. Need should be considered at the national, regional, and forest levels.

A Region 3 Wilderness Needs Assessment which will look at the need for wilderness at the national and regional levels will be prepared by the Regional Office.¹⁶ The forests should use the Region 3 Wilderness Needs Assessment as one criterion for evaluating the need for additional wilderness on the forest.¹⁷ The Region 3 Wilderness Needs Assessment addresses, in a regional context, the evaluation factors listed in FSH 1909.12, section 72.32. Each factor is evaluated by how well it is addressed by the current supply of wilderness within the region, and apparent gaps are identified.

A spatial display, that shows a variety of information such as existing wildernesses, inventoried roadless areas, and population centers, accompanies the narrative. The forests should review the gaps identified in the narrative and document whether or not each of their inventoried roadless areas could help fill those gaps. In addition, the forests will address need for additional wilderness within the forest's context.

¹⁴ FSH 1909.12 Chapter 70.

¹⁵ FSH 1909.12 Chapter 70, §71.1

¹⁶ Refer to the Region 3 Regional Wilderness Needs Assessment

¹⁷ The Regional Wilderness Needs Assessment will meet the requirements in ID 1909.12-2005-8 §72.3 for identifying need on a regional basis.

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Public involvement is a key requirement of the needs assessment. Input from the public will provide essential information on the local need for wilderness.

Step 3: Make Preliminary Administrative Recommendations

The forest will prepare a “Preliminary Administrative Recommendation” for those areas that will be recommended for wilderness designation as part of the land management planning process. The Responsible Official may want to consider using the plan option process to identify alternative management scenarios such as backcountry or primitive designations. The Regional Forester will forward the Preliminary Administrative Recommendation to the Chief.

Step 4: Prepare Plan Components

The forest will develop plan components for each IRA that is administratively recommended for wilderness designation¹⁸, and for each congressionally designated Wilderness Study Area not released by Congress (even if not administratively recommended for wilderness). Interim management guidance for administratively recommended wilderness needs to provide for the protection of wilderness potential. The following are suggested restrictions that forests should consider when writing plan components for administratively recommended wilderness and Congressionally designated wilderness study areas:

- Prohibit permanent road construction, except as specifically provided for in the Wilderness Act, or otherwise required by law.
- Improvements that are not acceptable according to FSH 1909.12, Section 71.11 should be prohibited.
- Do not allow new structures or facilities that will degrade wilderness potential.
- New commercial uses are allowed only if they do not compromise the wilderness potential, and if they are necessary to meet minimum requirements for the administration of the area as potential wilderness.
- Recreation settings shall be managed to either maintain existing Recreational Opportunity Spectrum (ROS) classifications or to set the desired condition to a more primitive ROS classification.
- Mechanical vegetation treatments that would compromise the wilderness potential are prohibited.
- Motorized recreation equipment and mechanical transport should generally be prohibited. If there is current motorized use, forests should allow motorized recreation equipment or mechanical transport to continue until the forest plan can be amended by the Travel Management Plan¹⁹ or other appropriate

¹⁸ There may be IRAs that are not recommended for designation as wilderness, though other special areas designations may be appropriate, such as scenic area or botanic area.

¹⁹ 36 CFR Parts 212, 251,261, and 295 – Travel Management ; Designated Routes and Areas for Motor Vehicle Use; Final Rule, 11/9/2005

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NEPA. However, the amount, type, and area of use should not be allowed to grow beyond what is currently established and allowed.

Optional Step:

If the forest wants to establish management direction that prohibits an existing use within a recommended wilderness, the appropriate NEPA must be completed (outside of the revision process covered by a CE) to amend the forest plan.

If requested by the Chief, the Forest would prepare the appropriate level of NEPA documentation for recommending an area for wilderness designation. The Regional Forester would be responsible for preparing the legislative proposal which would be forwarded to the Chief along with the NEPA document (this is not part of the plan revision process allowed under a CE, so must be done in a subsequent process).²⁰

Wild and Scenic River (WSR) Recommendations

A required part of plan revision is to identify rivers with potential for addition to the National Wild and Scenic Rivers System based on a systematic inventory. Agency policy is to protect free-flow, Outstandingly Remarkable Values (ORV) and classification of eligible or suitable rivers. The purpose of this section is to summarize existing guidance and provides additional guidance for how wild and scenic rivers evaluation should be treated in the plan revision process. For a complete and detailed description of all the required and optional steps, please refer to FSH 1909.12 Ch 80, and FSM 1924.

Required Steps:

This document summarizes/outlines, and in some cases supplements, instructions found in the handbook and the manual. The Wild and Scenic Rivers Act directs federal agencies to identify potential additions to the National Wild and Scenic Rivers System in Section 5(d)(1) through federal planning processes of the act.

Step 1: Identify the status of WSR assessment in the current land management plan (CER Phase I)

Document the findings of this evaluation. Arizona Forests have completed eligibility. Eligible rivers are identified in *Resource Information Report for Potential Wild, Scenic, Recreational River Designation, National Forests of Arizona* in September 1993. Four New Mexico Forests (Gila, Lincoln, Cibola, and Carson) completed eligibility and protected river values via Forest Plan amendments completed in 2001 and 2002. The Santa Fe National Forest completed eligibility during their initial forest planning process in the mid-1980's.

Step 2: Review inventory of Potential Rivers (CER Phase I)

Forests should review their inventory of potential rivers to ensure that all free flowing rivers with at least one potential ORV were included. Forests should document the

²⁰ FSM 1923.04

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findings of this review. Intermittent rivers may be potentially eligible, if the volume of water is sufficient to sustain or complement the river's outstandingly remarkable value(s). Appendix D displays an example template that forests may want to use to document the potential river inventory.

Step 3: Review Eligibility Determinations (CER Phase II)

Forests should review the adequacy of their eligibility determinations to ensure the rigor required by agency policy has been met (FSH 1909.12, Chapter 80).

Eligibility identifies whether a river or segment is free-flowing and possesses one or more outstandingly remarkable value(s). Modifications may be made to a previously completed inventory of eligible rivers based on changed circumstances. Examples of changed circumstances would be landscape changing events like wildfires and floods, changes in species rarity, land ownership adjustments, new state designations, and new federal statutes. Also, changes to an inventory could be made if information on which it was based is not currently factual.

The format shown in Appendix E is recommended for documenting a new eligibility analysis for a river not previously considered, or a change in eligibility status. These changes can also be documented using another format so long as it includes all the required information. Any changes made to a forest's existing inventory must be well documented, and a logical rationale must be cited. This documentation must go into the planning record.

Step 4: Determine Potential Classification (CER Phase II)

For rivers added to the eligible river inventory as a result of the reviews in Steps 2 and 3, the potential classification must be identified. The WSR Act specifies three potential classifications: wild, scenic, and recreational rivers. Classification is based on the condition of the river and adjacent lands; specifically, water developments, shoreline developments, accessibility, and water quality. The format shown in Appendix E may be used to document this information.

The inventory of eligible rivers, whether modified or not as a result of Steps 2 and 3 should be documented in the plan set of documents. Appendix F of this document provides a template that may be used.

Step 5: Prepare Plan Components (CER Phase II)

The forest will develop plan components for each eligible or suitable river. The purpose for the plan components is to provide guidance to protect the river's free flow, outstandingly remarkable values, and classification.²¹

The inventory of eligible rivers should be included in the forest planning record. At a minimum, the following information must be included: name of river, location

²¹ FSH 1909.12 Ch 80 §82.51 and 82.52

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description, river mileage (studied and eligible), determination of free flow, ORVs, and classification. Appendix F of this document provides a template that may be used.

Optional Steps:

Suitability Process

The Responsible Official has complete discretion to proceed with the following optional steps. Suitability provides the basis for the determination of which rivers to recommend as a component of the Wild and Scenic Rivers System. Suitability basically answers two questions:

- What is the best use of the river corridor?
- What is the best method to protect the river corridor?

Many factors are considered as a basis for the suitability determination, including:

1. River characteristics
2. Land ownership
3. Potential land uses that would be enhanced, foreclosed, or curtailed
4. Who would manage the river
5. To what extent river management would be shared by other agencies
6. Cost of acquiring additional lands
7. Do other agencies have the ability to manage the river on non-federal lands
8. Consistency with other agency plans, programs, policies
9. Support or opposition to designation
10. Contribution to river system integrity
11. Potential for water resources development
12. Contribution to other regional objectives/needs

Following an analysis of the suitability factors, the following steps may be completed:

Make Preliminary Administrative Recommendations - The “Preliminary Administrative Recommendation” is prepared by the forest. It identifies whether or not each eligible river is administratively recommended for designation. The Preliminary Administrative Recommendation allows those rivers found not suitable to be managed for other values.

Forward the Preliminary Administrative Recommendation – This would be done by the Regional Forester. If requested by the Chief, the Forest would prepare the appropriate level of NEPA documentation for recommending a river for designation. The Regional Forester would be responsible for preparing the legislative proposal which would be forwarded to the Chief along with the NEPA document (this is not part of the plan revision process covered by the CE, so must be done in a subsequent environmental analysis process).

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Other Types of Special Areas

In past forest planning efforts, some forests have compiled extensive inventories of areas that potentially fit special area designations and have evaluated each for appropriateness. Because of the time and financial constraints being placed on this plan revision effort, it will not be possible to complete such an extensive inventory. The “inventory” for potential special areas, will most likely come from information gathered in previous revision efforts or collaboration with internal and external audiences. The following is intended to provide a method of evaluating special areas for potential designation without compiling an extensive inventory.

When a forest develops a list of proposed special areas, they will need to determine which designations fit the areas. For a list of existing types of special area designations in Region 3 see Appendix B. Further information can be found in FSM 1921.16. If there is no designation that fits the purpose and conditions of the special area, then the Responsible Official has the discretion to develop a designation that meets the forest’s management needs.

Special area designations represent a wide spectrum of management possibilities which have differing amounts of flexibility depending on how and by whom they are designated. The forest may want to consider designating a new special area if a natural and cultural resource is or will soon be threatened by human activity, or when the area is highly valued or strongly advocated. A strongly advocated area may be strongly opposed as well. In these instances, consideration of the entire spectrum of special area designations may be a point of negotiations between parties. An ideal solution would be a collaboratively identified designation that all parties could accept. Even if there are no resources that need additional protection in an area, it may still make sense to designate a special area based on social or economic considerations, such as the ability of local communities to market the area for tourism purposes.

Use the following process to inventory and identify Other Special Areas.

Step 1: Compile list of existing special areas (CER Phase I)

Forests should examine existing documentation and land designations to determine if areas already matching the list specified in Appendix B occur on the Forest. Forests should also examine the current plan to see if there are designations that would more appropriately fit under a special area designation or vice versa. Forests should migrate from the current plan, existing special areas into the revised plan.

Step 2: Based on current desired conditions, conduct internal and external evaluation, and inventory to validate existing special area designations, and to determine if additional special areas merit consideration (CER Phase I)

A forest should validate the designation of existing special areas through internal and external evaluation. In addition there may be a need to determine if there are other areas

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needed to meet the desired conditions. These recommendations might meet the designations listed in Appendix A or they may fill another need defined by the forest. The list in Appendix A is not intended to be an exhaustive presentation of all areas that may qualify as other types of special areas. The Responsible Official has the flexibility to make new category designations in order to respond to local concerns. In addition, the Responsible Official needs to consider if there are other ways to respond to the identified need via desired conditions, objectives, suitability of areas, or guidelines.

Step 3: Prioritize implementation of the potential special areas on the list (CER Phase 1)

It is possible that this list of special areas may exceed a forest's ability to deal with detailed management guidance for these areas in the revision process. It is strongly recommended that forests prioritize the recommendation for implementation of management for these areas. There may be legislative, regulatory, political, or financial reasons for giving some areas a higher priority for implementation over others. The prioritized list would allow the forest to schedule the future site-specific designation of these special areas subsequent to the completion of revision. The Deciding Official will determine what potential special area recommendations to take forward into CER Phase II.

Step 4: During Plan Option(s) Development, consider further Special Area recommendations needed to achieve desired conditions (CER Phase II)

During collaborative Plan Option(s) development, new or modifications to existing Special Areas may be recommended (that weren't identified during Need for Change) in order to achieve desired conditions and objectives.

Step 5: Develop management recommendations for potential special areas (Proposed Plan/CER Phase II)

Make management recommendations for proposed special areas, based on the desired conditions collaboratively developed with the public. This may include, but is not limited to, determining whether additional designation is necessary, or whether additional site-specific analysis under NEPA is required (identification and implementation of projects or activities) and subsequently amending the revised Forest Plan as necessary.

Additional Optional Recommendations

There is no mandate to generate new special areas. However, there may be a need for a Forest to generate a list of proposed special areas requiring future NEPA consideration and responsible officer designation or recommendation. These areas may not have received official designation during plan revision but may continue to be of interest to a local community, or have significant natural or cultural resources. Another option is to designate a new special area through plan revision but to only issue interim management direction or direction that does not impact existing uses. A third possibility is to recommend the designation of a special area to the appropriate official to designate subsequent to the revision in a separate site-specific environmental analysis.

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References

Collaboration Resources

Collaboration Strategies for Plan Revisions
Public Participation Plan for the Revision of the Kiowa and Rita Blanca National Grasslands Land Management Plan
Red Lodge Clearinghouse – www.redlodgeclearinghouse.com
Partnership Resource Center – www.partnershipresourcecenter.org

Wilderness Resource

Wilderness Act of 1964, Public Law 88-577
36 CFR 219.7(5)(ii)
ID 1909.12-2005-8, Wilderness Evaluation
FSM 1923 Wilderness Evaluation
Monitoring Selected Conditions Related to Wilderness Character: A National Framework
(http://fsweb.wo.fs.fed.us/rhwr/wilderness/wc/wilderness_character_framework.pdf)

Wild and Scenic Rivers Resources

Key Documents

Wild and Scenic Rivers Act, PL 90-542
FSH 1909.12, Chapter 80, Wild and Scenic River Evaluation
FSM 1924, Wild and Scenic River Evaluation
IWSRCC, The WSR Study Process, December 1999 (<http://www.nps.gov/rivers>)
USDA/USDI Guidelines for Eligibility, Classification, and Management of River Areas dated September 7, 1982. (<http://www.nps.gov/rivers/guidelines.html>)
Resource Information Report for Potential Wild, Scenic, Recreational River Designation, National Forests of Arizona, September 1993

Other Resources

WSR Assessment in LRMP Revision Process, November 1996
(http://fsweb.wo.fs.fed.us/rhwr/rivers/index_wsr.html)
Wild and Scenic River Study in Forest Plan Revision: Developing the WSR Appendix
(http://fsweb.wo.fs.fed.us/rhwr/rivers/index_wsr.html) Referred to as SID.
Regional Forester's letter to Arizona Forest Supervisors, March 8, 2005
Candidate Rivers Database (http://fsweb.wo.fs.fed.us/rhwr/rivers/index_wsr.html)
Candidate Rivers GIS Maps (called Candidate River Mapping Instructions)
http://fsweb.wo.fs.fed.us/rhwr/rivers/index_wsr.html

Other Special Areas

See Appendix A, there are many Special Areas designations, and references for these are found in the appendix.

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Appendix A - List of Potential Special Area Designations

**Region 3 Expanded Version of FSH 1909.12 – 11.15 – Exhibit 01
Special Areas – Designating Official and Guidance Cross-reference**

Special Areas	Designation Authority	Additional Guidance Location
Statutorily Designated Areas		
National Monument	Responsible Official ²² recommends Presidential Executive order or Congressional act designates	FSM 2371
National Recreation Area	Responsible Official recommends Congressional act designates	FSM 2371
National Scenic Area	Responsible Official recommends Congressional act designates	FSM 2371
National Trails National Scenic Trails National Historic Trails	Responsible Official recommends Congressional act designates	FSM 2353.4
Wild and Scenic River	Responsible Official recommends Congressional act designates	FSM 1924 & 2354 FSH 1909.12 Chapter 80
Wilderness, or Wilderness Study Areas	Responsible Official recommends Congressional act designates	FSM 1923 & 2320 FSH 2409.19 Chapter 70
Highway Systems, Interstate and National	Congressional act established process, Secretary of DOT approves	23 CFR part 470
Administratively Designated Areas		
Scenic Area	Secretary of Agriculture designates if >100,000 acres, Regional Forester designates if < 100,000 acres unless delegated to Forest Supervisor.	FSM 2372, 36 CFR 294.1 (a)
Geological Area	Same as above	FSM 2372, 36 CFR 294.1 (a)
Botanical Area	Same as above	FSM 2372, 36 CFR 294.1 (a)
Zoological Area	Same as above	FSM 2372, 36 CFR 294.1 (a)
Palentological Area	Same as above	FSM 2372, 36 CFR 294.1 (a)
Historical Area	Same as above	FSM 2372, 36 CFR 294.1 (a)
Recreational Area	Same as above	FSM 2372, 36 CFR 294.1 (a)
Highly Developed Sites, such as campgrounds, winter sports areas, or other recreation sites.	Secretary of Agriculture designates if >160 acres, Regional Forester designates if < 160 acres	FSM 2372, 36 CFR 294.1 (b)
Experimental Forest or Range	Responsible Official recommends with concurrence of Station Director. Chief designates	FSM 4062

²² In the context of Forest Planning the Responsible Official, which is the recommending official, will always be the Forest Supervisor in R3.

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Special Areas	Designation Authority	Additional Guidance Location
National Natural Landmark National Historic Landmark	Responsible Official recommends Secretary of Interior designates	FSM 2373 FSM 2363.1
Research Natural Area	Responsible Official recommends, Regional Forester designates, with concurrence of Station Directors	FSM 4063
Scenic Byway - Forest Service	Responsible Official recommends Chief designates	None
Scenic Byway - National	Responsible Official recommends Fed. Highway Admin. designates	Federal Register, Vol. 60, No. 96/May 18, 1995/Notices FHWA/DOT interim policy.
Significant Caves National Recreation Trails	Responsible Official recommends Regional Forester Designates	36 CFR part 290 FSM 2352.4

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Appendix B - Existing Special Areas Found in Region 3

	ASF	CAF	CIF	COF	CNF	GNF	KNF	LNF	PNF	SNF	TNF
National Monument											
National Recreation Area											
National Scenic Area											
National Scenic Trails	✓		✓			✓				✓	
National Historic Trails		✓								✓	
Wild and Scenic River			✓	✓			✓		✓	✓	✓
Wilderness	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Wilderness Study Areas											
Highway Systems, Interstate and National											
Botanical Area		✓					✓		✓		✓
Geological Area											
Experimental Forest or Range											✓
National Natural Landmark							✓				
National Historic Landmark							✓				
Recreation Area											✓
Research Natural Area		✓	✓		✓	✓	✓	✓		✓	✓
Scenic Byway, Forest Service and National			✓				✓				
Significant Caves								✓			
National Recreation Trails							✓				
National Register of Historic Places			✓				✓				
National Game Preserve							✓				
State Natural Areas											✓
Geologic-Botanical Area											
Zoological-Botanical Area		✓			✓						
Rock Art Sites					✓						
Atmospheric and Astronomical Research Area			✓								
Interpretive Sites											✓
Environmental Study Areas											
Significant Heritage Resource Regions, Areas or Sites		✓	✓			✓				✓	

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Appendix C - Table of Processes for Special Areas

	Existing Special Areas	Potential Wilderness	Potential WSR	Other Special Areas
Inventory	Current Plan and Amendments; other official documentation	Start with IRAs and Congressionally designated WSAs, add other areas meeting criteria.	Review and update river inventory, if needed	Collaboration (Internal and External)
Evaluation	Identify changes that require new management, or un-designation. (Some designations may not have been included in the existing forest plans.)	Capability, Availability, Need	Review Eligible River Inventories and Potential Classification	Fit to Special Area Designation and determine necessary management direction
Recommendation	N/A	Preliminary Administrative Recommendations	N/A	<ol style="list-style-type: none"> 1. List of agency recommendations that require future NEPA 2. Designate a new special area 3. Recommend to appropriate official for designation

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Management Direction	Yes unless undesignated	Interim	Interim	Depends on recommendation option
Optional Future Actions (subsequent to revision process)	Subsequent NEPA for change in management or un-designation	Suitability Phase 2 (NEPA)- Agency Recommendation	Suitability and Preliminary Administrative Recommendation	NEPA for Designation

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Appendix D - Example Wild & Scenic River Inventory Documentation

Identification of Rivers on the _____ National Forest with Potentially Outstandingly Remarkable Values (ORVs)

River/Segment	Length	a	b	c	d	e	f	g	h	Remarks
Kelly Creek	24.0	x	x		x					
White Sand Creek	12.7	x	x		x					
Moose Creek	10.6									No potential ORVs
Rosebud Creek	21.2	x	x	x						Natural Bridge
Rock Creek	27.3									No potential ORVs
Boulder River	27.4						x			
Lost Cow Creek	6.3		x	x			x			
W. Fk. Clear Cr.	12.6									No potential ORVs
Lake River	13.4		x							Class IV-V rapids
Coal Creek	8.4									No potential ORVs
Beaver River	11.0	x						x		
Danaher Creek	13.5	x							x	Rare plants

Possible ORVs:

- a - Scenic
- b - Recreational
- c - Geological
- d - Fish
- e - Wildlife
- f - Heritage – Historic
- g - Hertigae - Prehistoric
- h - Other Values

Document the criteria used for whether or not intermittent rivers are included on the inventory. Document the criteria and identification of which values are potentially outstandingly remarkable in the planning files. Include the minutes of the team meetings at which river values were discussed and evaluated in the planning files.

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**Appendix E - Example Evaluation Form for Wild &
Scenic River Eligibility Analysis**

SUMMARY OF ELIGIBILITY ANALYSIS
SOUTHWESTERN REGION
_____ **NATIONAL FOREST**

River Segment:

From:

To:

Evaluated By:

Date:

Evaluation Step

NO

YES

I. ELIGIBILITY ANALYSIS

A. Free – Flowing

Existing or flowing in a natural condition without impoundment, diversion, straightening, rip rapping, or other modification of the waterway. The existence of low dams, diversion works or other minor structures does not automatically disqualify the segment for designation. A river segment below or between impoundments may also be considered.

Discussion:

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Evaluation Step

NO

YES

B. Scenery

- Do the landscape elements of landform, vegetation, water, color, and related factors result in notable or exemplary visual features or attractions? (When analyzing scenic values, additional factors—such as seasonal variations in vegetation, scale of cultural modifications, and the length of time negative intrusions are viewed—may be considered. Scenery and visual attractions may be highly diverse over the majority of the river or river segment.)

Discussion:

C. Recreation

- Are recreational opportunities popular enough or have the potential to be popular enough to attract visitors from throughout or beyond the region of comparison? (River-related opportunities could include, but are not limited to, sightseeing, wildlife observations, camping, photography, hiking, fishing, hunting and boating. Visitors are willing to travel long distances to use the river resources for recreational purposes.)
- Are recreational opportunities unique or rare within the region?
- Are interpretive opportunities exceptional or have the potential to attract visitors from outside the region of comparison?
- Does the river provide or have the potential to provide settings for national or regional usage or competitive events?

Discussion:

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Evaluation Step

NO

YES

D. Geology

- Does the river or river corridor contain one or more example of a geologic feature, process or phenomenon unique or rare within the region of comparison? (The feature(s) may be in an unusually active stage or development, represent a “textbook” example and/or represent a unique or rare combination of geologic features--erosional, volcanic, glacial or other geologic structures.)

Discussion:

E. Fish

(Fish values may be judged on the relative merits of fish populations, habitat, or a combination of these conditions.)

- Is the river a nationally or regionally important producer of resident and/or anadromous fish species? (Of particular significance is the presence of wild stocks and/or federal or state listed (or candidate) threatened, endangered or sensitive species. Diversity of species is an important consideration and could, in itself, lead to a determination of “outstandingly remarkable.”)
- Does the river provide exceptionally high quality habitat for fish species indigenous to the region of comparison? (Of particular significance is habitat for wild stocks and/or federal or state listed (or candidate) threatened, endangered or sensitive species. Diversity of habitats is an important consideration and could, in itself, lead to a determination of “outstandingly remarkable.”)

Discussion:

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Evaluation Step

NO

YES

F. Wildlife

(Wildlife values may be judged on the relative merits of either terrestrial or aquatic populations, habitat or a combination of these conditions.)

- Does the river or river corridor contain nationally or regionally important populations of indigenous wildlife species? (Of particular significance are species considered to be unique, and/or populations of federal or state listed (or candidate) threatened, endangered or sensitive species. Diversity of species is an important consideration and could, in itself, lead to a determination of “outstandingly remarkable.”)
- Does the river or river corridor provide exceptionally high quality habitat for wildlife of national or regional significance, and/or may provide a critical link in habitat conditions for federal or state listed (or candidate) threatened, endangered or sensitive species? (Diversity of habitats is an important consideration and could, in itself, lead to a determination of “outstandingly remarkable.”)

Discussion:

G. Heritage Resources – Historic

(The river, or area within the river corridor, contains important evidence of occupation or use by humans. Sites may have national or regional importance for interpreting history).

Does the river or river corridor contain a site or feature associated with a significant event, an important person, or a cultural activity of the past that was rare or one-of-a-kind in the region? A historic site or feature, in most cases, is 50 years old or older and is eligible for the national register of historic places.

Discussion:

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Evaluation Step

NO

YES

H. Heritage Resources – Pre-Historic

(The river, or area within the river corridor, contains important evidence of occupation or use by humans. Sites may have national or regional importance for interpreting prehistory).

Does the river or river corridor have unique or rare characteristics or exceptional human interest value; represent an area where a culture or cultural period was first identified and described; may have been used concurrently by two or more cultural groups; or may have been used by cultural groups for rare sacred purposes, and is eligible for the national register of historic places?

Discussion:

I. Vegetative /Ecological Values

(Vegetative and ecological values may be judged on the relative merits of either populations or communities, or a combination of these conditions.)

- Does the river or river corridor contain nationally or regionally important populations of indigenous plant species? (Of importance are species considered to be unique or populations of federal or state listed or candidate threatened, endangered, or sensitive species. Diversity and number of species area also important.)
- Does the river or river corridor contain nationally or regionally important plant communities? (Communities are exceptionally high quality, unusual or critical communities such as old-growth.)

Discussion:

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Evaluation Step

NO

YES

J. Other Similar Values

Consider values such as (but not limited to) hydrology, paleontology, and botany. Include criteria.

Discussion:

II. ANALYSIS OF ELIGIBILITY COMPONENTS

If Item I.A. and one or more other items above are checked "YES": River Area is eligible for designation.

Conclusion:

III. CLASSIFICATION

If river is eligible, what is the classification? Refer to Table 2 in the 1982 Wild and Scenic River Interagency Guidelines for the criteria used to determine classification.

Wild

Scenic

Recreational

Rationale:

Additional Instructions: It is critical to describe in detail the outstandingly remarkable values and to explain how they are unique, rare or exemplary features significant at a comparative regional or national scale. For each of the potential ORVs, include a description of the region of comparison that was used.

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Appendix F - Example Summary Form for Wild & Scenic River Eligibility Status

Rivers Eligible for Wild and Scenic River Status

_____ National Forest

_____ Date

Name of River	Segment Number	Segment Milepost From	Segment Milepost To	Free Flowing? (Y/N)	ORVs	Classification	Eligible?	Comments
Tonto Creek	2	6.4	27.9	Y	Scenic Geologic Fish and Wildlife Riparian	Wild	Y	
Tonto Creek	3	27.9	37	Y	Wildlife Riparian Ecological	Scenic	Y	