

FISCAL YEAR 2000

**MONITORING AND EVALUATION REPORT
FOR THE
NATIONAL FORESTS OF THE BLUE MOUNTAINS**

SEPTEMBER 2001

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SECTION I – INTRODUCTION

This monitoring and evaluation report for fiscal year (FY) 2000 documents the monitoring results for the three Blue Mountain Forests (Malheur, Umatilla, and Wallowa-Whitman National Forests) of northeast Oregon and southeast Washington. Fiscal year 2000 ran from October 1, 1999, to September 30, 2000.

Report Organization

This report is composed of five sections, this introduction being the first section. The remaining four sections document the monitoring items which were reported in FY2000. Section C contains the monitoring items which have been coordinated across the three Forests and are reported in generally the same manner. Sections M, U, and W contain those Forest specific monitoring items which have yet to be coordinated or are unique to a particular Forest. In some instances, not all ranger districts within a Forest reported on a monitoring item. In these cases the reporting districts are identified.

Monitoring and Evaluation

Monitoring and evaluation occur at several scales and fulfill many purposes. At the site-specific project level, monitoring is generally focused on determining if actions were completed as specified in decision documents and if they were effective in achieving specific goals. This type of monitoring is generally not directly reported in this document, although these findings are an important source of information to the level of monitoring this report focuses on, which is Forest Plan monitoring. The Forest Plans for the National Forests in the Blue Mountains were approved by the Regional Forester in 1990. These plans provide direction for integrated management of resources on the three Forests and are implemented through projects designed to be consistent with that direction. Monitoring at this level provides information to the agency and the public about how well the Forests are implementing Forest Plans, and if desired future conditions are being achieved.

Monitoring is integral to the correct and consistent implementation of Forest Plans. It consists of gathering data (generally on a sample basis), making observations, and collecting and disclosing information. Specific monitoring questions have been established by the Forests to ensure that monitoring and evaluation address information needed to measure Forest Plan accomplishment and effectiveness. Monitoring items have been identified to answer the monitoring questions. These questions and items are identified in monitoring plans developed for each Forest, which are the foundation for this combined annual report. These Forest specific monitoring plans are as follows: Malheur National Forest – *Forest Monitoring and Evaluation Plan* 1995, Umatilla National Forest – *Monitoring Strategy* 1994, and Wallowa-Whitman National Forest – *Monitoring Evaluation Report* 1991. Monitoring items in each plan are identified by number, which are used to track the items throughout this report.

Evaluation is the analysis of data and information collected during the monitoring phase. Evaluation determines if planned conditions or results are being attained and if they are within Forest Plan direction. As situations are identified as being outside the limits of acceptable variability, changes may need to occur. In this sense evaluation serves two main functions; it initiates changes in management practices, and provides a means to adjust Forest Plans, keeping them dynamic and responsive to changing conditions.

There are several types of monitoring. The Blue Mountain Forests program primarily focuses on the first two types of monitoring, implementation and effectiveness monitoring. The third type, validation monitoring, is more appropriately conducted in association with research and as such is primarily conducted outside the scope of monitoring included in this report. Although each type of monitoring builds on the previous type, they can overlap in time.

- Implementation monitoring – Determines whether activities planned in the Forest Plans have been implemented and whether the standards and guidelines were followed. It generally answers the “Did we do what we said we were going to do” question.
- Effectiveness monitoring – Determines if the implementation of activities has achieved the desired goals and objectives stated in the Forest Plans. It generally answers the “Are the management practices producing the desired results” question.
- Validation monitoring – Determines if the results predicted in the Forest Plans occurred and if the assumptions and models used in developing the Plans are correct. It generally answers the “Are the planning assumptions valid, or are there better ways to meet Forest Plan goals and objectives” question.

Why Combine the Monitoring Efforts of the Three Forests

The Malheur, Umatilla, and Wallowa-Whitman National Forests began a Tri-Forest monitoring program in 1997. A coordinated monitoring program was deemed beneficial for reasons such as follows:

- Many monitoring questions and protocols varied widely among the Forests, making it difficult to meaningfully aggregate information into a Blue Mountain or subregional context. Many issues facing managers of the Blue Mountain Forests are most effectively addressed on a broader, landscape scale and monitoring needs to speak to these scales.
- The number of required monitoring items has increased and some of these items can be most effectively monitored systematically on fewer sites across a larger area.
- The three Forests share common publics and issues, and the Forests should respond with similar monitoring objectives and methodology.
- Monitoring and evaluation are key elements of adaptive management as described in the proposed revision of the National Forest System Land Resource Management Planning Rule (36 CFR 219) and as proposed in the Proposed Decision of the Interior Columbia Basin Ecosystem Management Project. Each of these documents considers management at the landscape scale, and as such monitoring needs to be applicable at this scale.

The Forests are continuing to move toward fully coordinating and standardizing the monitoring program. This year’s report has built upon past successes and includes additional combined items as compared to last year’s report.

Tri-Forest Focus Monitoring

For the past three years, Tri-Forest interdisciplinary monitoring teams have reviewed specific groups of activities across the three Forests. These reviews have provided a valuable forum for the exchange of ideas and an additional level of review and evaluation. Due to a vacancy in the Tri-Forest Monitoring Coordinator position this past year it was not possible to conduct focus monitoring for FY2000. The Forests plan to begin focus monitoring again in FY2001.

Future of Forest Plan Monitoring

The nature and design of Forest Plan monitoring will be undergoing changes in the near future as a result of the proposed revision of the National Forest System Land and Resource Management planning rule (36 CFR Part 219), scheduled for publication in the Federal Register in the Fall of 2001. This rule affirms ecological, social, and economic sustainability as the overall goal for managing the National Forest System lands.

A key component of achieving and maintaining sustainability is the use of adaptive management. This is a type of natural resource management in which decisions are made as part of an ongoing process; and involves planning, implementing, monitoring, evaluating, and incorporating new knowledge into management approaches. Monitoring and evaluation are the learning tools which form the backbone of adaptive management. The proposed planning rule emphasizes monitoring and evaluation of resource conditions and trends over time so that management can be adapted as conditions change. Future monitoring and evaluation will need to evaluate the status and trend of ecological, social, and economic sustainability. Past monitoring reports will provide key information for this evaluation.

A complete overhaul of the monitoring strategy for the Blue Mountains Forests will not occur until the revision of the Forest Plans has been completed. However, there will be opportunities in the interim to adjust the current monitoring strategy to begin focusing on aspects of sustainability. One such opportunity is to utilize applicable parts of the ongoing LUCID (Local Unit Criteria and Indicator Development) project. This project, occurring on the Blue Mountain Forests and five other Forests nationwide, is a pilot test to determine the feasibility of sustainability monitoring at the local level. The local LUCID team has developed a suite of indicators to assess sustainable ecosystem management. These indicators may well provide a useful starting point from which to develop a new Forest Plan monitoring strategy.