

**Off-Road Vehicle Management on the Bitterroot National
Forest under the new Forest Service Travel Management Rule:**

An Assessment of Conditions and Management Approaches

**This report on OHV Planning Issues is a contribution to the
Bitterroot Ecosystem Management Research Project**

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Off-Road Vehicle Management on the Bitterroot National Forest

Public land managers nationwide are challenged to address increasing off-highway vehicle (OHV) use and the conflicts that arise over the types and locations of that use on National Forest System (NFS) lands. The fastest growing group of forest users on most national forests in the US is OHV riders. Forest Service chief Dale Bosworth cited unmanaged recreation as one of the four major current threats to the nation's forests and grasslands (*see for example* Bosworth, 2004, available at: <http://www.fs.fed.us/news/2004/speeches/01/idaho-four-threats.shtml>). In his speeches he has often explained unmanaged recreation using the example of growing OHV use on NFS lands, and during the speech listed at the address link above he said “We have got to improve our management [*of OHV's*] so we get responsible recreational use based on sound outdoor ethics.”

Chief Bosworth decided that the Forest Service would address OHV issues through a new service-wide travel management rule that would take a systematic approach to designating motor vehicle use on NFS roads, trails and areas by type of vehicle, and if appropriate, by time of year. The process would be designed to involve the public and engage user groups and volunteers to help protect national forest lands through ethical and responsible use. That rule was finalized in November of 2005 and applies to all NFS forests and grasslands. The new travel management rule promises to change OHV planning by requiring formal designation of all areas where motor vehicle use is allowed and by shifting the burden of knowing where legal use can occur from managers (via signage) to users (by referring to travel maps). The travel management rule calls for travel plans to be developed with public input that formally designate and map open roads, trails, and areas by classes of vehicles and times of the year that use may occur.

Travel management planning will begin in the near future on the Bitterroot National Forest (BRF) in Montana, and promises to present many challenges. The BRF is currently completing a general forest plan and will follow that with a specific forest-wide travel management plan. The Bitterroot Ecosystem Management Research Project (BEMRP) provides opportunities for the research branch of the Forest Service to work directly with BRF managers to develop science applications to inform management solutions. The planning of OHV use on the BRF was identified as a prominent management issue that might be assisted by BEMERP social science researchers.

District Rangers on the Darby and Stevensville Districts identified OHV use as one of their immediate planning challenges. Rising levels of OHV use on these Districts has increased demands for suitable opportunities, including scenic destinations and

connecting loops. There appears to be little agreement among the residents of the valley as to where motorized recreation use should occur. Residents living near the forest boundaries are especially concerned about impacts from increasing OHV use and designated routes near their homes. Recreation OHV users in the valley are concerned about their future opportunities for adequate, high quality access and motorized opportunities on nearby public lands. The District Rangers, along with travel planners from the Region One office of the Forest Service identified several types of information that would help them in the OHV planning process, including: 1) understanding of conflicts between OHV use and other recreation users, as well as concerns about OHV impacts on other types of forest uses and values; 2) the types of opportunities desired by OHV users on forest lands; and 3) current tools, innovations, and lessons learned from other travel planning efforts.

The challenge for managers is to determine an appropriate balance between competing desired future conditions on the forest, in this case, the split between motorized and nonmotorized designations on a finite number of travel routes. Both types of users usually desire the same types of settings and experiences. OHV users do not want to run up and down a small spur road all day any more than hikers want to. They all seek destinations, scenery, loops, and access for other activities. The managers would like this report to identify examples of unique, innovative solutions to conflict between user groups that can be incorporated into the ongoing planning process on the BRF. This report provides a source of information for planning OHV use on the BRF as formal travel planning moves forward under the new travel management rule. The following overview may be useful to managers, planners, local citizens, and organized stakeholders to provide understanding of current planning issues, innovative approaches, and the planning situation on the BRF under the new travel management rule.

For consistency with the travel management rule, this report uses the term ‘OHV’ to refer to all types of motorized vehicles capable of traveling off-road. Some of the references within this report use alternative or more specific terms to refer to these vehicles (e.g. ‘ORV,’ ‘ATV’). The term OHV as used in the travel management rule includes four-wheel drive motor vehicles, all-terrain vehicles (ATVs), motorcycles, and other vehicles capable of cross-county travel over land, water, snow, ice, marsh, swampland, or other natural terrain. All of these motor vehicles capable of traveling off-road are considered ‘OHV’s for the purpose of travel management on NFS lands.

USFS OHV Management

Forest Service managers were first directed to address OHV use by identifying acceptable areas and eliminating their use elsewhere through Executive Order 11644,

which was signed by President Nixon in 1972. This order was followed by Executive Order 11989, issued by President Carter in 1977, which amended the previous order by requiring managers to close areas adversely impacted by OHV use and authorizing managers to consider lands closed to OHV use unless specifically designated as open. Subsequent regulations and sections of the Forest Service Manual (FSM) and Forest Service Handbook (FSH) were developed to implement these two executive orders, and they provided the general framework for OHV management on NFS lands nationwide until being superseded by the Travel Management Rule of 2005.

The new travel management rule strengthens the previous framework in a number of ways, including requiring, rather than authorizing, managers to designate allowed use. The new rule also softens some of the previous language, for example by requiring managers to close damaged areas until the damage is mitigated rather than eliminated, as required under Executive Order 11989.

Travel Planning on NFS Lands in Region One

The national forests and grasslands in Western South Dakota, North Dakota, and Montana have been managing OHV use on public lands for several years under a policy that limits motorized use to existing roads and trails. Since July 1st, 2001 NFS lands in Region One, with the exclusion of northern Idaho, have been managed under a blanket EIS decision that mandates that OHVs stay on existing routes, thus consistently prohibiting cross-country OHV travel on most Forest Service lands in the region (<http://www.fs.fed.us/r1/news/2001/ohv-release.pdf>). The EIS decision also applies to BLM lands in the same region of western South Dakota, North Dakota, and Montana. This EIS effectively amended all existing Forest and Grassland plans in the three-state region when it was implemented in 2001.

The Travel Management Rule

The travel management rule provides a national framework for local units to use in designating a sustainable system of roads, trails, and areas for motor vehicle use. The rule's goal is to secure a wide range of recreation opportunities while ensuring the best possible care of the land. The travel management rule, released in November of 2005, was published in the Federal Register and is available at: <http://www.fs.fed.us/recreation/programs/ohv/final.pdf>. The Federal Registry publication includes an extensive summary of the more than 80,000 public comments received on the travel management rule, the agency responses to the comments, and the specific language of the rule.

Highlights of the Rule

- The rule requires each National Forest or Ranger District to designate those roads, trails, and areas open to motor vehicles.
- Designation will include class of vehicle and, if appropriate, time of year for motor vehicle use. A given route, for example, could be designated for use by motorcycles, ATVs, or street-legal vehicles, and could be open seasonally or year around.
- Once designation is complete, the rule will prohibit motor vehicle use off the designated system or inconsistent with the designations.
- Snowmobiles, while considered to be OHVs by definition, are exempt from the travel management rule requirement to stay on designated routes.
- Designation decisions will be made locally, with public input and in coordination with state, local, and tribal governments.
- The Forest Service can issue temporary, emergency closures of designated routes if they determine OHV use is directly causing or will directly cause considerable adverse effects. The closure notice must include the reason(s) for the closure and how long the closure is estimated to last. The agency must provide public notice of designated route closures.

Designation Effect

The designation requirement of the new travel management rule has generated considerable concern. Many people believe that formally designating all allowable travel routes and identifying them on a travel map will increase OHV use in those areas. Determining whether or not designation of a particular travel route will increase its use is complex, requiring consideration of a number of factors. If the route was previously used as a travel route in a similar way as under the new designation, there may be no change in use patterns or levels. However, if the newly designated route creates a loop connection opportunity that did not previously exist, local use in that area may grow considerably. Effective planning and identification of OHV opportunities must be done from a system perspective that considers a spectrum of recreation opportunities across a fairly large geographic area such as a Ranger District or entire National Forest. While the public has expressed similar concerns over the effect of designating national destination areas such as units of the Wilderness Preservation System or National Park System, there appears to be no evidence that formal designation of an existing travel route would necessarily increase non-local visitation or increase overall travel within a region. None of the comprehensive OHV planning bibliographies reviewed and presented in this report show evidence of travel route designation effects on OHV use levels.

It is likely that increased use on designated routes will result from concentration of use rather than an overall increase in use *caused* by the designation itself. Although trends nationwide suggest that OHV use will continue to grow overall, increases in local use due to designation under the new travel management rule should be partially offset by decreases or elimination of OHV travel in less suitable areas. While designation itself may not increase use from outside of a region, especially considering that all NFS lands across the nation will be required to designate their OHV routes, changes in local use patterns are likely to occur as a result of the travel planning and formal designation process. The planning process may identify areas to concentrate certain types of use where it is deemed appropriate while use in other areas may be curtailed. The appropriate uses in a particular area must be considered within the larger spectrum of motorized and nonmotorized recreation opportunities across the entire forest, district, or other relatively large planning unit.

Information for OHV Planning

The remainder of this report presents information about a number of valuable resources that were identified during the review of this topic. The sources generally address developing understanding about conflicts, desired type of opportunities, and current tools, innovations, and lessons learned from other travel planning efforts. The information from these sources is briefly described here and then summarized and linked to more complete sources in the appendices of the report. Consultation with experts nationwide has suggested that these resources are among the best examples of current knowledge about OHV planning. This information may be useful to managers, planners, collaborators, and other stakeholders interested in future OHV management on the BRF.

The information is presented in four appendices. Appendix A presents a summary and link to the agency's Motor Vehicle Route and Area Designation Guide. This new document, developed by the National OHV Implementation Team, provides a six-step framework recommended by the agency for managers to follow in developing and implementing a comprehensive travel plan under the travel management rule. Appendix B summarizes four recent social science efforts to clarify OHV issues, conflicts, and planning solutions. Appendix C presents outlines of three alternative decision support planning frameworks: one from a proprietary source, one from an agency source, and one from a collaborative stakeholder source. Each of these decision support tools could be implemented within the overall planning process described in Appendix A's designation guide, and each would be useful for directing the organization of information included in a comprehensive OHV travel planning process under the travel

management rule. Appendix D lists key contact information for some of the organized stakeholders likely to be involved in the BRF OHV planning process.

Route and Area Designation Guide

This document was developed by the National OHV Implementation Team to provide a consistent set of guidelines for OHV planning on NFS lands under the new travel management rule. The guide suggests a six-step framework for developing and implementing a comprehensive travel plan under the travel management rule. The process outlined in the Motor Vehicle Route and Area Designation Guide includes the following six major steps which are further described in Appendix A along with a link to the complete guide on the Forest Service internal web site:

1. Compile Existing Travel Management Direction
2. Assemble Resource and Social Data
3. Use Travel Analysis to Identify Proposals for Change
4. Environmental Analysis and Decision-Making
5. Publish Motor Vehicle Use Map
6. Implement, Monitor, and Revise

Alternative Perspectives

Appendix B offers a number of perspectives from inside and outside the agency on current OHV issues. The first report summarized in Appendix B is an annotated bibliography compiled at the University of Vermont that covers the environmental and social effects of ATV and ORV use. Following the bibliography are summaries and citation lists from two recently completed professional papers of graduates of the Master of Science program in the College of Forestry and Conservation at the University of Montana, Missoula. The citation lists alone from these recent works are valuable tools to individuals wanting to comprehensively identify the historical and contemporary literature on OHV use and OHV management on public lands. The professional papers themselves are also well worth reading, and each provides in-depth coverage of different aspects of OHV conflicts and management solutions. The final resource summarized in Appendix B is a set of case studies with reflections on lessons learned that were compiled for the USFS OHV Implementation Team in preparation for the National OHV Collaboration Summit in 2005.

Annotated Bibliography of Impacts

Dr. Patricia Stokowski and Christopher LaPointe of the University of Vermont compiled the annotated bibliography of OHV impacts in 2000 for the state of Vermont. The research described in the report assesses many aspects of impacts and conflicts that have been studied throughout the US. The types of impacts that are described in the report include those related to soil erosion and trail degradation; vegetation; water and air quality; noise; wildlife and fish; and social conflicts among different types of recreation user groups. The full report is not included in the appendix, but was downloaded from the web on April 4, 2006 at:

<http://www.americantrails.org/resources/wildlife/docs/ohvbibliogVT00.pdf>

Policy Analysis

The professional paper by Brenda Yankoviak first covers the history of travel planning on NFS lands and the current situation in Region One of the Forest Service. The paper then presents a review and critique of the travel management rule, including the author's views on its strengths and weaknesses. One critique of the rule is its failure to provide management guidelines for addressing noise, which is one of the most cited conflicts over OHV use. The paper provides examples of noise ordinances that have been passed to address this issue on public lands within local jurisdictions. California has a noise ordinance that applies to OHV use on all public lands in the state, though many people feel the 96-decibel limit is too liberal to be effective. The paper lists several other noise ordinances covering smaller jurisdictions that have enacted stricter limits.

This paper takes a critical perspective on the Forest Service travel management rule and the author's opinions about its utility differ from the perspective of the agency. The paper is referenced here for its value in providing an historical review of OHV issues and because it raises important concerns that have been expressed by some members of the public that must be considered in planning under the travel management rule. An agency perspective of these criticisms is provided in the responses to public comments documented in the final travel management rule published in the Federal Register, and available at: <http://www.fs.fed.us/recreation/programs/ohv/final.pdf>.

Equity Considerations in Reducing Conflicts

The second professional paper presented in Appendix B is by Clifton Koontz. This work is a thoughtful contribution to developing an OHV planning approach that derives local resource allocation decisions based on consideration of equity in access to recreational trail types based on a recreation opportunity spectrum (ROS) framework. The approach recognizes recreation activity displacement based on the level of

technological dependence. The ROS framework provides a basis for comparing the supply of trails by level of difficulty and level of technological dependence of the dominant activity on the trail. In this model, equity is maximized by providing opportunity for each type of trail-based activity to be the most advanced type of technology allowed on some trails or trail sections, and by requiring activities to share some trail resources with other, more and less technologically dependent activities.

Planning Case Studies

The third resource summarized in Appendix B is a set of case studies with reflections on lessons learned that were compiled for the USFS OHV Implementation Team in preparation for the National OHV Collaboration Summit in 2005. The document is briefly summarized in the appendix, while the entire set of case studies along with a series of stakeholder perspective briefs is available at a useful Forest Service OHV planning website: <http://www.fs.fed.us/recreation/programs/ohv/> (report available at: <http://www.fs.fed.us/recreation/programs/ohv/CaseStudyReport.pdf>). The public website also contains the proceedings from the OHV summit along with other OHV-related documents and links including: news releases, background papers, the final published travel management rule, guidance for implementing collaborative approaches, and national estimates of OHV use on NFS lands. A similar internal US Forest Service site for managers and planners (which also includes the Motor Vehicle Route and Area Designation Guide) is located at: <http://fswb.w.o.fs.fed.us/rhwr/ohv>.

Of particular interest in the case study report are the two cases from Forest Service Region One described by Cynthia Manning, a social scientist from the regional office in Missoula. The first case describes the somewhat limited success of collaboratively developing a travel management plan for the Big Snowies on the Lewis and Clark NF. One of the values of this report is its description of working collaboratively with various organized stakeholders including close cooperation between the Montana Wilderness Association and the Montana Snowmobile Association. The second report describes the evolution of the Montana, North Dakota, and South Dakota OHV Environmental Impact Statement (EIS), which was developed collaboratively by the Interagency Working Group and limits OHV use to established routes on all Forest Service and BLM lands in these states. Complete copies of these two cases are included in Appendix B following the executive summary of the entire report.

Planning Frameworks

Appendix C includes three outlines for decision support tool frameworks designed to systematically work through the complexity of OHV travel planning and route

designation on public lands. The three frameworks represent three different perspectives on the process: a private travel planning consultant, an agency planner, and a cooperative of organized stakeholder groups. All three frameworks offer similar approaches. They are each listed in the appendix because their similarities, given their diverse sources, are noteworthy and provide valuable comparisons. The first outline, a proprietary model, is the most comprehensive. The second and third models are public domain examples offering in-house alternatives. All of the examples approach OHV planning with an emphasis on good inventory of existing routes, consideration for each route within a larger travel system, and encouragement of public input throughout the process. Each of these frameworks could be used as part of the six-step process described in the Motor Vehicle Route and Area Designation Guide in Appendix A.

The first outline is the most comprehensive. Developed for public agencies by Advanced Resources Solutions, Inc. (ARS), it is referred to as the Route Evaluation Tree Process for Travel Management Planning. This 26-step process leads to a comprehensive designated travel route system and an EIS record of decision. The process is dependent throughout on public input, and begins with identification and thorough inventorying of all existing routes – including agency and user created segments. Step 17 of the route evaluation process implements ARS’ proprietary route designation software, which guides the planners and collaborators through the designation process for each travel segment identified in the inventory. This process can take a year or more, but results in a comprehensive travel plan with a system-wide perspective. This approach was featured at a 2006 travel management workshop sponsored by the USGS in Ft Collins CO, and was recommended by several of the BLM and Forest Service travel planners who had experience using it. This process has been used by at least 11 planning units of the BLM and USFS, and has been instrumental in successful development of travel plans on a number of national forests and BLM lands in the West, including the Dixie National Forest in southern Utah and the multi-agency Arizona Strip area near the Grand Canyon. It is presented here because it has a history of use in agency planning efforts. Managers considering using the ARS model should consult the agency contacts listed in Appendix C for insight on its strengths and weaknesses. This summary is not offered as an endorsement, but as one example of proprietary decision support tools that are available to assist managers in travel planning.

This proprietary process’s value comes from its software’s systematic organization and documentation of large amounts of inventory and designation data. The process does not provide managers with answers to tough resource allocation and user conflict issues. It does systematically generate a NEPA-type range of planning alternatives for each inventoried route segment, but those alternatives are dependent on

the accuracy and feasibility of the information and possible mitigating actions provided by planners. Appendix C provides the ARS process outline along with contact information for the company. Also included are contacts for two federal agency planners who have used the process and who are willing to share their experiences and opinions of the process with other federal travel planners. The final component of the information about this proprietary decision support tool is an editorial perspective from a stakeholder participant in the Ft. Collins travel management workshop that is somewhat critical of the ARS process

The appendix then lists the sources and outlines for the two planning nonproprietary framework approaches. I did not find examples of agency implementation of these frameworks, and I do not know if they have been used as extensively or successfully as the ARS approach. Travel planners on the BRF have probably developed similar structured approaches through their own experiences, and it is hoped that these outlines will suggest possibilities for improvements and alternatives. Any of these structured approaches would be consistent with the guidelines of the Motor Vehicle Route and Area Designation Guide listed in Appendix A.

Organized Stakeholders

Appendix D provides a list of stakeholders that may be interested and involved in the OHV travel planning process on the BRF. Though it is not a comprehensive list, it does contain contact information for a number of prominent interest groups. The list is divided into local, state, and national interests. Local interests have largely been identified through the public comment process, state interests through their involvement in other travel planning efforts, and national interests through their prominence in advocacy, education, and information about OHV use and impacts.

Two of the local stakeholder groups listed in Appendix D, the Ravalli County Off Road User Association and the Burnt Ridge Neighborhood Association, have specifically expressed interests and concerns in the planning process, and some of their perspectives are listed in notes following their contact information. The positions of these groups largely reflect the types of issues experienced by others in OHV planning described in this report. It is hoped that through sharing these experiences, the BRF planning process can proceed with less difficulty. It is apparent that the issues that will need to be addressed on the BRF are complex, value based, and difficult to solve.

Conclusion

The Bitterroot National Forest released its new draft forest management plan in the spring of 2006. Following the adoption of this general plan, the BRF will proceed

with the development of a forest-wide travel management plan to inventory and designate OHV travel routes consistent with the provisions of the new travel management rule. Stevensville and Darby District Rangers have indicated that their districts are developing good inventory data of existing travel routes on the BRF. They describe their challenges to include maintaining an up-to-date inventory of routes and conditions, ongoing monitoring of these routes, working with OHV users to reduce impacts and conflicts, and working with all stakeholders to identify appropriate and acceptable OHV opportunities.

The USFS policy and experiences of planners nationwide suggest that a collaborative process with a system wide, forest-level perspective, such as planned for the BRF, will be the most appropriate and successful for developing a widely supported OHV travel management plan. Including OHV travel planning within relatively small forest stewardship projects, such as the Trapper Bunkhouse Forest Stewardship Project of concern to the Burnt Ridge Neighborhood Association, presents special challenges because these projects do not generally occur at the appropriate scale for consideration of a comprehensive OHV travel system. The Trapper-Bunkhouse project is listed in a notice to the Federal Registry at: <http://www.epa.gov/fedrgstr/EPA-IMPACT/2005/September/Day-21/i18792.htm>, and is also described on the Bitterroot Ecosystem Management Research Project (BEMRP) website at:

http://www.fs.fed.us/rm/ecopartner/Reports/VEGETATION_TB%20Research.pdf.

Research is needed to better understand the integration of travel planning within forest fuels management projects. The effects of fuels reduction, logging, wildfires, and other localized natural disturbances on forest-wide travel management are not well understood, and research is needed on how to incorporate consideration of specific, limited scope management and natural disturbance influences on these larger scale road and trail systems.

On-going involvement of the public in OHV planning will be mandatory for public acceptance of the resulting plans. Developing a good understanding of recreation uses, along with environmental and social impacts will improve the acceptability of the final travel plan. In addition to the collaborative approaches described in this report, which have relied on organized stakeholder groups to articulate competing perspectives, this process may benefit from developing understanding of the complex perspectives of average local residents through social science assessments of communities of place and communities of interest in the Bitterroot Valley. With this kind of in-depth understanding of complex local relationships to national forest lands, managers and stakeholders may better work together in the spirit of cooperation, hopefully somewhat diffused from the polarized nature that has marked past contentious OHV planning efforts. While the resources identified in this report are a good snapshot of currently used

approaches to OHV system planning, there remain several gaps in knowledge about how to meet and manage OHV demands on the BRF. The following research questions are suggested by the above review of OHV planning literature and the state of knowledge about successful OHV planning:

- What spectrum of experiences and opportunities are desired by OHV users on NFS lands, and what are the limitations of providing them?
- How can OHV and nonmotorized recreation opportunities be equitably considered within overall travel planning to minimize conflict and resource impacts?
- What are the interaction effects of travel planning and forest stewardship/fuels management projects? What are the effects of wildland fires and other natural disturbances on travel systems? What opportunities and constraints do forest stewardship projects present for travel planning?
- How can complex relationships between the public and NFS lands, including relationships involving both use and nonuse values, be incorporated into OHV travel planning?
- What are the best practices for fostering collaborative planning, building trust and accomplishing resource protection and access objectives in a cooperative manner?
- How can estimation and monitoring of OHV use, impact levels, and resource conditions be developed, implemented, and improved?

Appendix A: USFS Motor Vehicle Route and Area Designation Guide

The following pages present the table of contents and the introduction to the US Forest Service Motor Vehicle Route and Area Designation Guide. The introduction describes the guide's six major steps to motor vehicle route and area designation on NFS lands. The entire guide is available on the internal Forest Service web site at <http://fswweb.wo.fs.fed.us/rhwr/ohv>. It is accessible for downloading only from within the agency computer system, although the document will be provided to the public on request. The USFS National OHV Implementation Team recently developed this document as the overall guide for travel route designation under the agency's new travel management rule.

MOTOR VEHICLE ROUTE AND AREA DESIGNATION GUIDE



National OHV Implementation Team



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MOTOR VEHICLE ROUTE AND AREA DESIGNATION GUIDE

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MOTOR VEHICLE ROUTE AND AREA DESIGNATION GUIDE

INTRODUCTION

The purpose of the *Motor Vehicle Route and Area Designation Guide* (Guide) is to assist interdisciplinary teams in designating roads, trails, and areas for motor vehicle use, leading to publication of a motor vehicle use map. The Guide provides a framework for designation and implementation and a variety of reference tools.

This Guide is not management direction, and field units may adopt their own approaches or take only elements they find useful, to the extent consistent with 36 CFR part 212, subpart B. The Forest Service is preparing proposed changes to travel management directives in the Forest Service Manual and Handbooks.

The process outlined in the Guide includes six major steps (see page 4):

1. Compile Existing Travel Management Direction
2. Assemble Resource and Social Data
3. Use Travel Analysis to Identify Proposals for Change
4. Environmental Analysis and Decision-Making
5. Publish Motor Vehicle Use Map
6. Implement, Monitor, and Revise

The prohibition on use of motor vehicles off designated routes becomes effective when field units complete the designation process. It is critical that the agency move quickly to complete designation, and a broad spectrum of interest groups supports this goal. In order to expedite designation and avoid process gridlock, route and area designation should be guided by the following considerations:

- *Focus, focus, focus* – Tightly focused processes, analyses and decisions will minimize gridlock. Decisions should be focused on motor vehicles. Don't try to solve all travel management issues at once.
- *Avoid unnecessary inventory* – A complete inventory of user-created routes is not necessary. Gather only the information needed to evaluate proposed changes in travel management direction.
- *Avoid unnecessary environmental analysis* – An environmental impact statement (EIS), environmental assessment (EA), or land management plan amendment is not necessarily needed to designate a route system. There is no need to reconsider decisions made prior to the new travel management rule. Use travel analysis (step 3) to identify narrowly tailored proposals to change travel management direction, and conduct environmental analysis

only when necessary. A decision to construct a route, add a route to the forest transportation system, or change authorization of or prohibitions on motor vehicle use on a route or in an area is subject to the National Environmental Policy Act (NEPA). The ministerial action of identifying a designated route or area on a motor vehicle use map is not.

- ***Focus on the change from the status quo*** – For many national forests, the result of designation will be to change from cross-country motor vehicle use to a system of routes and areas designated for motor vehicle use. For other national forests, the motor vehicle use map will simply confirm travel management decisions that have already been made. Analysis should focus on the change from the current situation.
- ***Collaborate*** – Collaboration with federal, state, local, and tribal governments and the public is critical to the designation process. Involve government agencies and the public early and throughout the designation process to avoid surprises, promote trust, credibility, and coordination, and provide an integrated system of designated routes that is socially, environmentally, and economically sustainable and enforceable.

A key consideration in route and area designation is geographic scale. The proper scale for analysis will depend on the local situation, and may differ from one step to another in the designation process. Many units may wish to complete travel analysis at the level of a national forest, to address environmental and social issues at a broad scale. Other units may complete travel analysis at the level of a district, watershed, or mountain range or at some other scale. Travel management decisions to authorize or change motor vehicle use on particular routes will often be at a smaller scale than the travel analysis. The motor vehicle use map reflecting designated routes and areas will be published at the district or administrative unit scale.

Prior to initiating the designation process, units should use travel analysis to evaluate their current travel management situation and identify proposed changes in travel management direction.

Current Situation	Actions
<ul style="list-style-type: none"> • Motor vehicle use restricted to NFS roads and NFS trails • No need to change roads, trails and areas managed for motor vehicle use 	<ul style="list-style-type: none"> • Notify public • Publish motor vehicle use map
<ul style="list-style-type: none"> • Open to cross-country motor vehicle use • No need to change roads, trails 	<ul style="list-style-type: none"> • Make decision to prohibit cross-country motor vehicle use • Publish motor vehicle use map

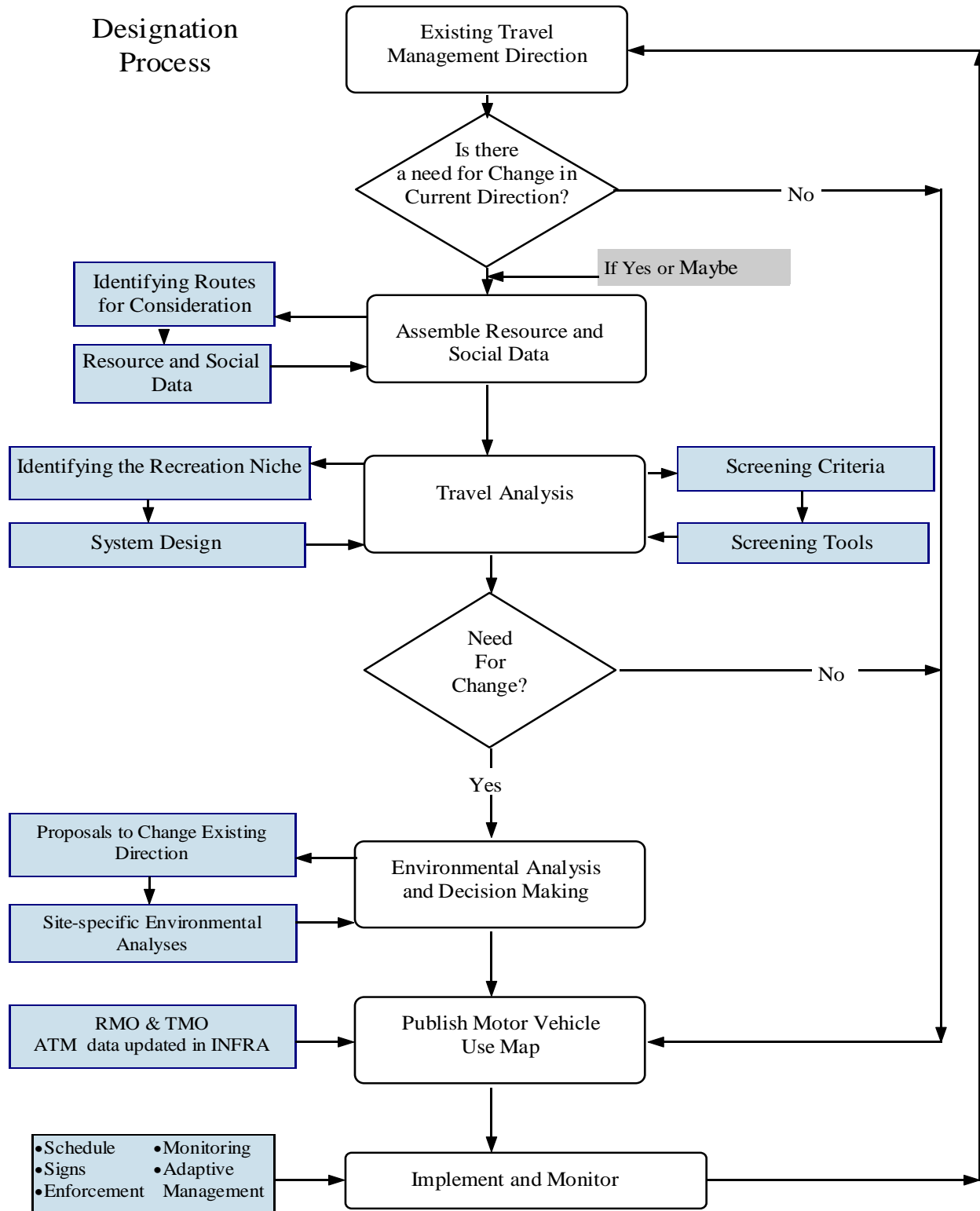
<p>and areas managed for motor vehicle use</p>	
<ul style="list-style-type: none"> • Motor vehicle use allowed or restricted. • Need to consider some user-created routes for designation, or otherwise change roads, trails, and areas managed for motor vehicle use. 	<ul style="list-style-type: none"> • Propose adding routes to the forest transportation system or making other changes in travel management direction • If cross-country motor vehicle use is allowed, make decision to prohibit it • Publish motor vehicle use map

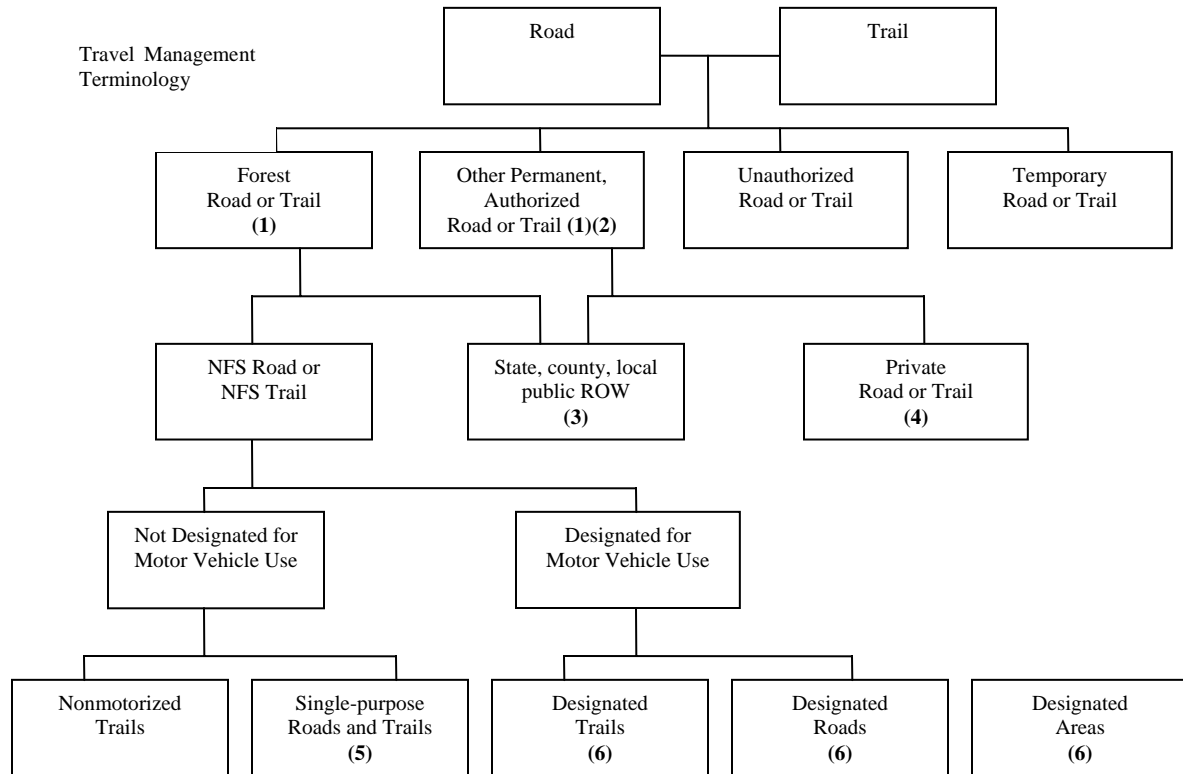
Each unit will need to consider its travel management situation and local issues carefully to determine if there is a need for change. A change in existing travel management direction may be necessary to accommodate existing and anticipated use or to protect resources. If a unit already prohibits motor vehicle use off designated routes and outside designated areas, and no change to those designations is needed, the unit may proceed to public notice and publication of the motor vehicle use map. Nothing in the final rule or this Guide requires reconsideration of previous travel management decisions. Appendix A includes examples of some typical situations that may be faced by national forests beginning the designation process.

Each unit should also consider whether existing information is sufficient to support travel management decisions or whether new data are needed.

This Guide provides a range of approaches for route evaluation. One of the principles of the rule is local decision-making within a national framework. The agency has been careful to provide for local flexibility to respond to local situations. At the same time, a certain level of consistency is necessary, particularly for adjoining units. A single trail generally should not be open to motor vehicle use on one side of a national forest boundary and closed on the other side, unless there is a good reason. Line officers must coordinate route and area designation with nearby units to ensure that the system of designated routes and areas makes sense for the land and for the users.

Designation Process





(1) Included on forest transportation atlas.

(2) Includes permanent public and private roads authorized by a written instrument that are not necessary for use of the NFS.

(3) Includes forest highways as well as other public roads on a legally documented right-of-way.

(4) Includes permanent private authorized roads not necessary for use of the NFS (e.g., private access to an inholding).

(5) Includes ML1 roads and other forest roads not designated as open to motor vehicle use (e.g., a private road to access a mining claim on NFS lands).

(6) Included on a motor vehicle use map.

Appendix B: Recent Comprehensive Reviews of OHV Issues

Environmental and Social Effects of ATVs and ORVs: An Annotated Bibliography and Research Assessment, November, 2000. by Patricia A. Stokowski, Ph.D. and Christopher B. LaPointe, School of Natural Resources, University of Vermont. Downloaded on April 4, 2006 at: <http://www.americantrails.org/resources/wildlife/docs/ohvbibliogVT00.pdf>

Summary

This report provides an annotated bibliography of published research related to the environmental and social effects of ATVs on public and private lands. Citations were gathered in a comprehensive literature review of published research reports and peer-reviewed scholarly writing, and from a review of internet sources. Key findings from the research are synthesized and evaluated, and suggestions for future research are provided.

A wide variety of environmental and social impacts are documented in the research literature, including those related to soil erosion and trail degradation; vegetation; water and air quality; noise; wildlife and fish; and social conflicts among different types of recreation user groups. Key findings can be summarized as follows:

General: Regardless of vehicle type (ATVs, ORVs, snowmobiles), research generally shows very similar impacts; differences in impact level are due more to intensity of use or use characteristics, in combination with the level of fragility of the affected environment.

Air Quality: Studies of air quality impacts are limited, and often focus on the emission effects of snowmobile operation. Findings show that emissions tend to exceed human health standards. Further research about the effects of ATV emissions on humans and other species, and for general air quality, is needed.

Soil and Vegetation: Soil and vegetation impacts are widely discussed in the literature, and obvious to even casual observers. Soil compaction and the shear forces of motorized vehicles create mud holes and gullies that alter hydrologic patterns and intensify erosion. More studies are needed to quantify the amount and extent of soil loss attributable to ATV use in the Northeast.

Trails: Trail erosion and compaction caused by off-road and all-terrain vehicles reduce the quality of recreational trails and require enhanced management action to develop and maintain safe, usable trails. Specific studies are lacking in the New England region.

Wildlife: Wildlife impacts have been primarily studied in relation to Western habitats and have often focused on snowmobile use. Wildlife are negatively impacted by the presence and noise of ATVs, ORVs, and snowmobiles, although

some mammals (deer, for example) may become, over time, habituated to these vehicles. Snow compaction also affects the survival and activities of small mammals. Studies of ATV impacts on wildlife in Eastern settings appear to be limited.

Forests: ATV use has been found to widen and rut forest roads, and to increase the sediment load to streams which may threaten fisheries. ATVs and ORVs offer access to resource areas that are typically less accessible and more remote.

Recreation: ATV, ORV and snowmobile use often conflicts with non-motorized uses, such as hiking and cross-country skiing. Additionally, noise and intrusion of the modern world into nature often compromises the enjoyment of many user groups. The numbers of motorized recreationists, and their intensity of use, also results in environmental degradation that reduces the pleasure of non-motorized visitors, potentially resulting in displacement of the non-motorized users.

Snowmobiles: Studies show that snowmobiles compact insulating layers of snow and thus compromise the habitat of mammals living below the snow layer. Since snowmobiles share the same noise characteristics as ATVs and ORVs, they may put undue stress on large ungulates, including moose and deer.

Off-Road Vehicle Policy on USDA National Forests: Evaluating User Conflicts and Travel Management, by Brenda M. Yankoviak. Presented in partial fulfillment of the requirements for the degree of Master of Science in Recreation Management, College of Forestry and Conservation, The University of Montana, December 2005. This report can be obtained from the University of Montana Mansfield Library and was downloaded on May 10, 2006 at: <http://www.cfc.umt.edu/departments/socn/socontheses/yankoviak.pdf>.

Yankoviak Abstract:

Since the history of off-road vehicle (ORV) management on National Forest System (NFS) lands was spurred in part by the need to reduce user conflicts between motorized and non-motorized users, one might assume such conflicts to have been diffused after 30 years of management actions. To the contrary, decades of inconsistent management and inadequate enforcement have largely characterized the history of Forest Service ORV management, leading to continued environmental damage and user conflicts. The Forest Service recently released another travel management policy that largely prohibits cross-country off-road vehicle use and restricts motorized travel to designated roads, trails and areas on NFS lands. Many forests across the nation will amend travel plans or undertake travel planning pursuant to the new policy.

In light of this new policy, the purpose of this paper has been to evaluate its potential effectiveness in reducing user conflicts resulting from ORV use. To that end, this paper: 1) Reviews the history of Forest Service travel management policy that has led to the need for this policy change, 2) examines the context within which the conflicts are occurring- e.g. rapidly increasing recreation use of NFS lands, and 3) summarizes the themes common to conflicts between motorized and non-motorized recreationists. This paper then puts forth expectations for the effectiveness of the Forest Service's new policy in minimizing user conflicts and provides concrete suggestions for moving forward.

This paper argues the new policy is not likely to reduce user conflicts resulting from ORV use on NFS lands for several reasons. First, the new regulations are not much different from previous regulations, other than they contain less specific language with respect to closure of areas and trails due to considerable adverse effects and considerations for route designations. Second, the policy neither defines the term "user conflict" nor addresses how to evaluate if such conflicts exist and, if so, how to accommodate competing claims from legitimate uses. Thirdly, the policy ignores noise pollution, one of the most cited complaints of off-road vehicle use. One measure to reduce conflict felt by many users is to impose noise limits on motor vehicles operating on NFS lands.

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Recreational Trail Conflict: Achieving Equity Through Diversity, by Clifton R. Koontz, presented in partial fulfillment of the requirements for the degree of Master of Science in Recreation Management, College of Forestry and Conservation, The University of Montana, May 2005. This report can be obtained from the University of Montana Mansfield Library and was downloaded on May 9, 2006 at: <http://www.cfc.umt.edu/departments/socn/socontheses/koontz.pdf>.

Koontz Abstract:

An increasing demand and decreasing supply of outdoor recreation opportunities have fueled conflict between user groups. Conflicts that begin as one group's interference of another group's goals eventually become symmetrical, and involve land management agencies. Managerial responses to conflict often become the focus of controversy. Fairness in the allocation of resources is central to the debate.

For recreational trails, multiple-use is necessary to achieve efficiency in management, community among trail users, and to minimize biophysical impacts. At the same time, zoning use-types best mitigates social impacts, which are typically one-directional. In an effort to resolve conflict, this research investigates how to fairly distribute recreational trails among various user groups.

First, the nature of conflict is considered in terms of two conflict predictors: mode of travel and mode of experience. More technological uses generally conflict with less technological uses. Activity-based experiences tend to interfere with setting-based experiences. Different modes of travel are potentially compatible if compensated by different modes of experience.

Diversity in opportunities is key to achieving fairness. An equitable land management district must allow each user group to be the most technological activity permitted on some portion of its trail system. The Recreation Opportunity Spectrum concept is utilized by mapping trail systems based on the most technological uses permitted for each route. This evaluation is applied to BLM trails surrounding Moab, Utah.

Second, facilitating public involvement is promoted as critical in planning for diverse trail systems. Collaborative processes that are inclusive, informed, and deliberative can reward agencies with better plans and greater support. Mode of travel can serve to acknowledge conflicts between groups. Mode of experience can provide a foundation of commonality. The collaborative process is evaluated for recreation planning in Grand County, Utah.

Third, this project addresses ways for managers to communicate plans and their rationale to visitors. Describing entire trail systems in terms of diversity encourages a district-wide consideration of fairness. Detailing potential types of encounters helps match visitors with appropriate opportunities. By utilizing predictors of conflict, managers can articulate a universal trail ethic that spans across activities. These concepts are compared to the communications program for Sand Flats Recreation Area in Utah.

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Executive Summary

With few exceptions throughout the country, the fastest growing community the Forest Service works with is off-highway vehicle (OHV) users. These include the drivers, riders, and passengers of 4X4s, Jeeps, All Terrain Vehicles (ATVs or quads), and dirt bikes. They use their vehicles as the centerpiece of their recreational activities, or as a means of transportation for other experiences such as family camping in remote locations, rock climbing, hunting or fishing. The Forest Service recognizes the interest of OHV users to the country's 192 million acres of National Forests, as well as the drawbacks associated with this use if it is not managed responsibly.

Within the Forest Service, two national OHV teams are working to address the need for a broader, more cohesive strategy for managing OHV use. The first group has focused on developing a national policy framework, including proposed rules for designated routes and locations for OHV use. Another team, the National OHV Implementation Team, has focused on providing tools, techniques and best practices associated with managing OHVs. In compiling these best practice examples, the Team recognized the critical importance of collaborative approaches in implementing successful OHV programs.

The National OHV Implementation Team set out to document some of the more prominent examples of collaboration in the context of OHV activities, in order to share these cases as a means for highlighting best practices in collaboration, and for sharing the key lessons learned from this experience. The Team was not necessarily looking for "success stories," but more for a representative range of project management settings and experiences that could be examined for key lessons that would have wide national relevance and application. Cases selected for analysis included:

- 1) Arizona OHV Inventory Partnership
- 2) California Off-Highway Vehicle Stakeholders Roundtable
- 3) Caribou-Targhee Travel Management Collaborative Learning Workshop
- 4) Cromer Ridge OHV Management: Daniel Boone National Forest
- 5) Hopkinton-Everett Reservoir Multiple-Use Trail System Trails
- 6) Lewis and Clark National Forest: Big Snowies Access/Travel Management Plan
- 7) Montana, North Dakota, South Dakota Interagency Working Group
- 8) OHV Use and Forest Plan Revision on the Ouachita National Forest
- 9) Perry Stream All-Terrain Vehicle Trails
- 10) Southeast Idaho Trail System

11) Wenatchee National Forest Off-Road Vehicle Trails The case studies provided a foundation for discussions during the National OHV Collaboration Summit, held in San Diego, CA on April 11 – 13, 2005. The Summit presented a unique opportunity for diverse interests to meet, reflect, discuss, and identify lessons and actions for achieving greater success in OHV management. The Summit's goals included:

Convene public and private sector representatives to share lessons learned on the role of collaboration in OHV management

Present the stages of the collaborative process – what works, who to engage, timing for collaboration

Learn about collaboration pitfalls and how to navigate bumps in the road

Share public involvement approaches to OHV route designation

This report presents the eleven case studies (revised based on conversations during the Summit as well as input received from readers of initial drafts) as well as some of the keynote presentations from the Summit. Authors of the case studies have offered their own synthesis of key lessons learned from the cases; to complement the authors' collective sense of key lessons, the report also includes a "perspectives" section, offering some of the diverse viewpoints on collaborative problem-solving in the context of OHV activities.

It is hoped that this report - the case studies, keynote presentations from the Summit, and the varied assessments of lessons learned from these analyses and discussions - will help broaden, elevate, and continue to encourage the important conversations and reflections about the application of collaborative approaches in the management of OHVs on America's public lands. And that the lessons learned from this experience can be widely shared and lead to the development of more effective OHV management programs.

LEWIS AND CLARK NATIONAL FOREST, MONTANA: BIG SNOWIES ACCESS AND TRAVEL MANAGEMENT PLAN

By Cynthia Manning

HISTORY AND BACKGROUND

In January 2002, the Lewis and Clark National Forest (LCNF) signed an Access and Travel Plan for the Big Snowies mountain range, located in central Montana. Eight groups and ten individuals appealed the plan. Instead of working through the standard administrative appeal and litigation processes, LCNF staff, working with the Montana Snowmobile Association (MSA) and the Montana Wilderness Association (MWA), suggested trying the collaborative process that had proved successful on the Flathead National Forest. All parties agreed it might be worthwhile to attempt some sort of collaborative process – to arrive at a negotiated, cooperative agreement between the appellants – in order to resolve the pending appeal.

Between July 2002 and April 2003, a group of individuals and representatives of special interest groups met to address appeals of the Big Snowies Access and Travel Management Plan (BSATMP). The group decided to address this plan, and in addition, access and travel planning in the Little Belts, Castles, and Crazy Mountains ranges. This group was indeed modeled after the collaborative approach used on the Flathead NF. In that process, the Montana Wilderness Association (MWA) and the Montana Snowmobile Association (MSA) agreed upon certain areas being deemed appropriate and open for snowmobile use, and certain areas where snowmobile use was not appropriate.

PRIMARY STAKEHOLDERS AND ROLES

The MWA, represented primarily by John Gatchell, and the MSA, represented primarily by Alan Brown, were the principal participants in this collaborative process. These two individuals served as the project's facilitators. This is of particular interest, as these two groups have traditionally been at odds with each other. But given other successes working together, they felt they could pull together, along with the local interest groups, and see what points of agreement they could reach.

Other groups involved in the effort included local snowmobile clubs, the local chapter of MWA (the Central Montana Wildlands Association, or CMWA), and the Great Falls Cross Country Ski Club. The Forest Service also participated throughout the project. Forest Service personnel did not participate in the discussions per se, nor lead or facilitate the meetings. They did provide leadership and “the glue” for keeping the process going,

as well as technical support, maps, public notification and note taking, and a meeting place.

PRINCIPLE OBJECTIVES

The group set rather clearly defined objectives: 1) delineate rather large areas on a map where winter motorized use could or could not occur, 2) identify where snowmobilers could recreate virtually unhampered, and 3) identify where non-motorized opportunities would be considered. The next step would have been to do the same for summertime use. However, as noted below, the group was unable to address summertime management issues.

In identifying large areas of motorized and non-motorized use, the group sought to protect groomed trails and play areas, while also ensuring secure wildlife habitat and quiet areas for non-motorized uses. The group worked under the general assumptions that points of agreement would be carried forward as the Proposed Action, and that they were to maintain a strongly pragmatic orientation.

ACHIEVEMENTS TO DATE

The group was able to negotiate an agreement, which was finalized in April of 2004. The Great Falls Cross Country Ski Club, two of the snowmobile clubs, MSA, MWA and their local chapter signed the agreement. The agreement initially covered four of the mountain ranges in the area, but ultimately ended up addressing only two of the ranges – the Big Snowies and the Little Belts. The agreement allocates large blocks of land for snowmobile use as well as large blocks of land that are to remain in a roadless, non-motorized state.

KEY CHALLENGES

The group faced major challenges distinguishing between winter and summer uses. People interviewed could not pinpoint why this occurred – but the group was not at all successful working collaboratively towards designating areas for summer motorized use (e.g., motorcycle, ATV) and areas to be maintained for non-motorized use. The group had decided to first work toward blocking out areas for winter uses and then to take on the summer uses. But it seemed that the summer users were not comfortable with the concept of “blocking out” substantial acreages for one use or another. In addition, MSA stated from the beginning that they did not represent summer users nor have any authority to address summer

uses, and thus would not be able to lend their dedicated leadership to the effort.

COLLABORATIVE PROCESS

This collaborative process was well thought out prior to its inception, particularly since it had a previous example, from the Flathead National Forest, to use as a model. It was important to the participants that an atmosphere of respect and dedication was fostered. The group decided not to work towards consensus per se, but toward answering the question: “can you live with it?”

The group began by first by not looking at the Big Belts, where the BSAMTP had been appealed, but by looking at the three other mountain ranges in the area. These ranges, the Little Belts, Crazies and Castles, all receive more snowmobiling activity than the Snowies. They agreed to return to discussions regarding the Snowies after working to resolve most of their concerns across the larger landscape. Agreement seemed to be progressing, but unfortunately just before the agreement was to be signed, one of the snowmobile groups elected against signing, as it did not feel it could represent uses by other snowmobile groups in the southern Crazies and Castles.

LESSONS LEARNED

- 1) Participants should take a positive approach – become advocates for success, and consider failure not to be an option. Participants should work in a problem-solving mode, share a common belief in the process, and they should work together toward what is best for the resource and for the public. The collaborative approach gives some ownership to participants and to the overall public. Acknowledge that people have their own individual personalities and that that’s acceptable and appropriate.
- 2) The group should establish guiding principles or ground rules and stick to them. Each group should identify a spokesperson who can act in the role of “negotiator.” The overall group should establish a common understanding that their selected negotiators should have authority for their groups; they should provide leadership, take a facilitative approach, and establish mechanisms for accountability. Insist upon a commitment (towards the stated objectives and of participation) prior to initiating.
- 3) Clarify the role of the Forest Service, how the Forest Service will use outcomes of the process as well as any limitations or constraints

(sideboards). The Forest Service must set the stage for collaboration; the agency regains trust when it lives up to its word.

4) Sometimes the people or group perceived to be the “worst adversary” becomes your best ally in a collaborative process. This gives these efforts power.

5) The collaborative process took about twice as long as was originally planned. But most participants felt that it was better to spend the time upfront, as opposed to later on. For this reason, the collaborative process may ultimately be the cheaper option.

STILL TO ACCOMPLISH

The Montana Wilderness Association and the Montana Snowmobile Association plan to continue working collaboratively to help designate areas where snowmobile use appears appropriate and where wilderness qualities are important to retain. They are currently working on completing their fifth winter agreement, this one on the Lincoln Ranger District, Helena National Forest; they will then work toward completing the rest of the Helena NF.

Disagreement over travel management within the Big Snowies now involves the judicial system. The Central Montana Wildlands Association (CMWA) was one of the appellants of the 2002 decision. CMWA declined to participate in the collaborative process that was later initiated in 2002. In September 2004, CMWA filed a lawsuit against implementation of the original 2002 decision for the Big Snowies, and also against implementation of the 2004 winter recreation agreement for the Big Snowies and Little Belt mountain ranges. Both MSA and MWA asked to intervene in support of the Forest Service in respect to implementation of the winter recreation agreement. In addition, MWA filed a cross-claim in support of CMWA’s opposition to implementing any part of the original 2002 decision involving management of summer recreation. The District Court (Judge Donald Malloy, presiding) granted intervener status to both MSA and MWA, and they are both parties to the case; however, the Court has not yet ruled on the cross-claim by MWA. In a preliminary hearing, the District Court denied CMWA’s request for a Preliminary Injunction against implementing the winter recreation agreement and the 2002 decision, thus ruling in favor of the Forest Service and the interveners. Because the Big Snowies is a Wilderness Study Area, the District Court denied the request for a change in venue from Missoula to Great Falls. Litigation on this effort is expected to continue throughout 2005.

MONTANA, NORTH DAKOTA, SOUTH DAKOTA INTERAGENCY WORKING GROUP

By Cynthia Manning

HISTORY AND BACKGROUND

The Montana, North Dakota and South Dakota Interagency Working Group (IWG) began forming in 1996. Managing for Off-Highway Vehicles (OHVs) had become an increasing challenge for all land and resource management agencies, State and Federal alike. The IWG saw opportunities for various agencies to work toward a common understanding of OHV use, misuse, and direction regarding OHV usage, and believed they could develop a consistent approach regarding OHV use on Federal lands. They also foresaw the opportunity to provide a resource for OHV information and education. An added benefit would be the exchange of information and cooperation among the various agencies.

The IWG collaborated on the development of a strategy for OHV use, and pursued this through the formal NEPA process, including the completion of an Environmental Impact Statement (EIS). The decisions made as a result of this environmental analysis pertain to all Forest Service and Bureau of Land Management managed lands in the state of Montana, and in western South Dakota and North Dakota. While other state and federal agencies were and remain active participants in the group, the decision pertains only to those two federal agencies.

PRIMARY STAKEHOLDERS AND ROLES

Three primary agencies were (and continue to be) involved in the IWG: the Bureau of Land Management (the Montana State Office, which also serves North and South Dakota), the USDA Forest Service, Northern Region (with the exclusion of Northern Idaho), including representation from the Regional Office and individuals representing various National Forests and Grasslands, and the Montana State Department of Fish, Wildlife and Parks (FWP).

The IWG is governed by two co-chairs, representing two of the three primary agencies. These positions have been filled by various people over the years, and participation in the overall IWG has also changed over time. Each agency worked with the public and with appropriate stakeholder groups through their respective public involvement strategies. The FWP provided special opportunities to work with affected groups, such as the Montana Snowmobile Association and the Montana Trail Riders

Association. In addition, OHV use and management issues were identified as a high priority by various BLM Resource Advisory Committees (RACs), multi-stakeholder groups chartered under the Federal Advisory Communication Act (FACA), which work closely with the BLM regarding land and resource management issues.

An interdisciplinary team (IDT) was formed to conduct the Environmental Impact Statement. A BLM employee initially served as Team Leader, followed by a Forest Service employee. The IDT conducted formal public involvement activities. In order to evaluate site-specific routes, the team also conducted an inventory of designated routes.

PRINCIPLE OBJECTIVES

The IWG decided right from the start that they wanted to take a functional approach to this collaborative effort. They agreed that their first priority would be to devise a strategy to manage OHV use, and that the best way to accomplish this would be via an Environmental Impact Statement (EIS) to address cross-country OHV travel.

ACHIEVEMENTS TO DATE

The IWG worked with a BLM and Forest Service EIS team to produce an EIS and two Records of Decision (one for the BLM and another for the FS). The EIS decisions mandate that OHVs stay on existing routes; wheeled, cross-country travel is eliminated. The Forest Service decision served as an amendment to all of the Forest and Grassland Plans within Montana, North Dakota, and South Dakota. Prior to this decision, each Forest Plan had different ways of dealing with OHV management. Most areas were open for cross-country OHV travel unless they were otherwise posted. Cross-country OHV travel is now prohibited in most areas.

The IWG developed both an implementation and a monitoring program. They developed training events and materials for managers, created OHV education “trunks” for schools as well as general OHV education and information programs. They produced signs, posters, key chains, and brochures with various messages regarding responsible OHV use.

The Group also believes that they were able to bring the issue of better management of OHV use to light, and takes pride in the fact that the Chief of the Forest Service has recognized improper OHV use as one of the four main threats facing the Forest Service. They also continue to serve as a “sounding board” for OHV and travel and access issues on public land.

Communication between OHV user groups and other groups (e.g., Back Country Horsemen) and the agencies has improved. As one interviewee commented: “We’re listening to them and they’re listening to us.”

After the EIS was signed, a decision was reached by the State of Montana, through the Montana Fish and Game Commission, regarding law enforcement. OHV-related law enforcement is a major challenge in this region, given the extensive area and the presence of limited law enforcement personnel. The Fish and Game Commission adopted Federal OHV Prohibitions by making a violation of these Federal Regulations also a violation of Commission Rule. This allows FWP wardens to write a State ticket on federal lands, if the OHV violation occurs during a hunting season. This has virtually tripled the number of law enforcement officers with authority over OHV regulations on federal lands.

KEY CHALLENGES

The key challenges for the IWG have been, and continue to be:

- 1) Enforcement of the decision made in the EISs – to disallow OHV cross-country travel. There are just not enough law enforcement personnel available.
- 2) Personnel changes – keeping leadership and membership going and active.
- 3) “Keeping the focus.”

COLLABORATIVE PROCESS

The IWG formed in response to an animated discussion among Forest Service District Rangers in Region 1 regarding the challenges of OHV use, and the desire and need to devise a strategy to manage OHV use. The group had a clear mission, and this allowed them to form an efficient and dedicated team. They recognized that representation from all the various resource management agencies needed (and continues to need) to be at the table and working together.

During the implementation phase (beginning in about 1997), the IWG met once a month. The EIS team worked together continuously throughout the NEPA process. The team now meets twice a year; they also conduct monitoring trips twice a year. The information and education subcommittee meets an additional three to four times per year.

The Group functioned with a somewhat standard leadership structure and operating procedures. A Chairperson ran the meetings, and specific tasks were undertaken by individual members and also by designated subcommittees. All members of the Group are government officials who shared a common knowledge and culture about conducting business. Glitches in the process were relatively minimal, since as they all share a common objective.

LESSONS LEARNED

- 1) A functional approach helps with the focus and productivity of a group (at least this one).
- 2) A collaborative group like this takes a lot of energy, especially to keep it going over the years. It helps when participants have the energy and dedication, and a commitment to the Group's overall objectives. "It's worth meeting if we can show we're being effective."
- 3) One reason the Group was successful was because they were able to bring all the agencies together. Talking proved to be a good way of learning about the various ways OHVs were (or were not) being managed, and about the agencies' various laws and policies. Conflicts between and among Federal and State agencies were identified, discussed, and usually resolved.
- 4) The support and interest of the Regional Forester and the BLM State Director (and ultimately the Chief of the Forest Service) lent an even greater sense of credibility, timeliness, and importance to the group.
- 5) An interagency group can do some things collectively which they can't do individually. In addition, the public develops an understanding that the IWG is working towards common goals and common management of OHVs, irrespective of which agency has jurisdiction on the ground.

STILL TO ACCOMPLISH

The IWG continues to meet. Participants feel that the exchange of information and cooperation between the agencies benefits them all. They see great value in continuing discussions about this topic and possibly about other related issues. The IWG plans to develop further informational and educational products, and to begin working on a strategy for implementing the Forest Service's OHV policy.

Appendix C: Travel Planning Outlines

The following three outlines provide examples of currently used, systematic approaches to OHV travel planning on public lands. The first example is an outline of an approach utilizing proprietary software developed by Advanced Resources Solutions, Inc. This OHV route designation process has been successfully employed on a number of NFS and BLM lands in the West including the combined jurisdictions of the Arizona Strip, and the Dixie National Forest in Utah. The second example is a US Forest Service guidebook to route designation on NFS lands in California. The third planning outline example was developed by the Colorado Mountain Club and The Wilderness Society, and like the other two examples, emphasizes a system-wide, collaborative approach that considers a range of recreation opportunities across the planning unit.

Route Evaluation Tree Process for Travel Management Planning, Developed by Advanced Resources Solutions, Inc.

The route evaluation process is a proprietary tool developed by Advanced Resources Solutions to facilitate travel management planning. If a manager elects to use this process, they hire Advanced Resources Solutions as a consultant to run the software, guide the process, and develop databases. Currently about 11 units of the BLM and NFS have used this process to conduct travel planning in their region.

The Dixie National Forest in southern Utah has used this process and recommends it. The contact person on the DNF is Noelle Meier, nmeier@fs.fed.us, (435)865-3225.

National Park and BLM units located on the Arizona strip jointly used this process to conduct a regional travel management analysis. The contact person for that project is Morisa Monger, marisa_monger@blm.gov, (435)688-3285.

Les Weeks is the proprietor of Advanced Resources Solutions, Inc. of California, USA (530)676-1095

Outline of Process: (*Note: public input is encouraged throughout this evaluation process*)

SCOPING:

1. Coarsely identify issues for the planning area
2. Identify Primary:
 - a. Resource concerns
 - b. Access concerns
 - c. Political concerns
3. Coarsely identify desired future condition and management goals and objectives in the planning area.

4. Sub-regions:
 - a. identify sub-regions of planning region with similar issues
 - b. identify hot spots of concern, or primary issues
5. Identify/refine primary issues for each sub-region
6. Coarsely identify sub-region management goals and objectives
7. Identify priority sub-region(s) and boundaries
8. Coarsely develop different alternatives principally based upon primary issues for priority

DATA REFINEMENT:

9. sub-regions
10. Identify primary data deficiencies related to primary issues
11. Identify how primary data deficiencies can be addressed
12. Sources:
 - a. Agency Staff
 - b. Volunteers
 - c. Contractors

PREPARE FOR ROUTE EVALUATION:

13. Rectify data deficiencies
14. Divide each sub-region into sub-subregions to be able to create maps at a scale that can clearly portray the coverage information necessary for route evaluation, e.g. 1:24,000 scale.
15. Create maps for each sub-subregion for route evaluation
16. Review alternatives and fine tune the travel management objectives for each alternative

ROUTE EVALUATION (*this step uses Advanced Resources Solutions, Inc proprietary software*)

17. Refine evaluation tree menu options to insure that identified issues are adequately addressed.

DEVELOPMENT OF RANGE OF ALTERNATIVES:

18. Evaluate each route utilizing the Route Evaluation Tree; concurrently enumerate each route and, as needed, for each route segment.
19. Record evaluation code for each route under each alternative as well as special notes (e.g. potential impacts, proposed mitigation, etc.)
20. Integrate Access and GIS databases to create maps for each alternative showing recommended route networks.
21. Input on Range of Alternatives regarding preferences (e.g. input from staff, management, cooperating agencies and/or public)

NEPA DOCUMENTATION:

22. Development of Preferred Alternative as part of Range of Alternatives
23. Develop and circulate DEIS
24. Public comment

- 25. FEIS
- 26. ROD

The Route Evaluation Tree Software was discussed at a travel management workshop in Fort Collins, CO on February 21-23, 2006. The following is an OHV advocate evaluation of the tool based on his workshop experience:

To Tree or Not to Tree, Available at: (<http://www.cohvco.org/news/news.php?item=99>)
Monday, March 6, 2006
by Jerry Abboud, Colorado Off-Highway Vehicle Coalition

The Policy Analysis and Science Assistance Branch (PASA) of the U.S. Geological Survey (USGS) Fort Collins Science Center (FORT) hosted a national workshop February 21-23, 2006, in Fort Collins, Colorado. The workshop addressed the issues of transportation systems on public lands, including research, collaboration, and management approaches to inform decision making, focus on conflicts, policy, social values, and changing demographics of recreation users.

So much for the who, what, where..... This was primarily about the use of a data based evaluation tree marketed by Advanced Resource Solutions that identifies and evaluates roads and trails for travel management decisions. It has real promise, if still dealing with a few bugs. Those are mostly related to software support.

This Evaluation Tree is the cause of great consternation among the environmental Community—that in and of itself is usually an defacto endorsement from the motorized community, but we will set aside the axes for the moment and focus on the value of an important concept that may well assist in uniformity of decisions.

This product is, like all tools as good as the data that goes in and the individuals who will interpret the data to make the final travel management decisions. Having said that, the evaluation tree has a number of very attractive elements to it. First, it is an effort to bring objectivity and consistency to the evaluation process. Want to know the criteria that went into route evaluation? Look at the parameters of the tree and how any single route was assigned characteristics per the evaluation process.

Second, from an agency perspective, the element of protection of the administrative record becomes an important issue. Once this process is upheld by an appellate court as an element of a specific decision, relief from constant legal challenges and re-dos is anticipated. Finally, the tool helps reduce the workload as travel management decisions loom large on the horizon.

Remember, the OHV Rule and the BLM Directive from a practical standpoint, require designations of system roads and trails in the near future. This is a monumental task within diminishing budgets and small staffs. If the agencies can afford the cost of the tree, there may also be a net savings to some units carrying out the designation process.

Time will tell, but the tool has already been used in several travel management decisions with varying success, although poor results may once again point back to the garbage in problem or poor decision making. A tool is once again only as valuable as the one who wields it.

Special thanks to Greg Mumm, Blue Ribbon Executive Director and John Bongiovani, for joining me and providing excellent comments as part of a balanced panel discussion.

OHV Route Designation Guidebook, National Forests in California, Developed by the USDA Forest Service. Downloaded on April 4, 2006 at:
<http://www.fs.fed.us/r5/rwahr/ohv/route-designation/guidebook/toc.html>

This guidebook presents procedures for designating off-highway vehicle (OHV) routes for the National Forests in California, based upon existing laws, regulations, and policies. It was developed by an interdisciplinary team consisting of Regional and Forest level specialists in recreation, engineering, environmental analysis, law enforcement, heritage resources, and wildlife, as well as representatives from the Office of the General Counsel.

The purpose of route designation is to prevent resource damage and recreational use conflicts from indiscriminate, cross-country travel by wheeled OHVs. OHV use will be redirected to existing sustainable roads, trails, and specifically defined areas.

Designation of OHV routes has been broken down into 5 steps, starting with Global Positioning System (GPS) mapping of existing routes and areas currently used by OHVs and finishing with the issuance of Forest Orders that prohibit OHV use off roads, designated trails, and specifically defined areas. A key requirement throughout the procedures is collaboration with the public. Completion dates are indicated for all steps.

To aid guidebook users, interpretations of OHV policies and assumptions used in preparation of the guidebook are included, along with a glossary. These are followed by a list of the 5 steps and a timeline that shows the interrelationships among the steps. Detailed descriptions of all five steps make up the main portion of the guidebook. The appendices contain forms for OHV management direction and use evaluation, examples of how to record information and prepare Forest Orders, and reference information.

Five Steps to OHV Route Designation:

Step 1

- Map existing unclassified roads, motorized trails, and use areas
- Compile existing Forest OHV Management Direction
- Designate team leaders, assemble needed information, identify gaps in data
- Involve the public

Step 2

- Prepare Forest Order maps
- Issue temporary Forest Orders

- Involve the public

Step 3

- Fill out OHV Use Evaluation Forms for all routes and areas
- Develop proposed OHV systems
- Determine 4-wheel drive trails vs. roads
- Complete surveys of information and data gaps
- Involve the public

Step 4

- Complete analyses and prepare NEPA documents
- Involve the public

Step 5

- Issue Forest Orders
- Implement NEPA decisions
- Involve the public

Travel Management Planning Process, Developed by the Colorado Mountain Club and The Wilderness Society, Fall 2004.

1. Identify recreation and transportation goals for the planning area.
 - A. Transportation and recreation goals from concurrent or approved RMP
 - B. Regional goals for transportation connectivity
 - C. Public destinations
 - D. Valid and existing access rights
 - E. Area-wide goals for ROS – type and quantity, nonmotorized
 - F. Area-wide goals for ROS – type and quantity, motorized

2. Assemble resource data
 - A. Biological
 - i. Non-game wildlife and plant pop.
 - ii. Game wildlife coverages
 - iii. Unique habitats – e.g. riparian, geological, etc.
 - iv. Other relevant data – e.g. T&ES
 - v. Expert opinion for coverages where data doesn't exist
 - vi. Compile coverages, identify high priorities
 - B. Cultural
 - i. Cultural site location
 - ii. Cultural and historic landscapes
 - iii. Traditional religious and cultural properties significant to Tribes
 - iv. Historic trails
 - v. Compile coverages and identify high priorities
 - vi. Identify sites eligible for National Registry of Historic Places
 - C. Physical
 - i. Soil types
 - ii. Watersheds, hydraulic features
 - iii. Unique geological occurrences or structures
 - a. Paleontological
 - b. Springs or seeps
 - c. unusual
 - d. aesthetic
 - D. Substantial natural areas (>1000 acres)
 - E. Landscape health
 - i. Areas where standards are met
 - ii. Stream segments by condition
 - iii. Other existing measures of landscape health
 - iv. Areas damaged by OHV use
 - v. Compile data and identify areas not achieving standards

3. Identify baseline travel system
 - A. Non-motorized hiking or biking routes
 - B. Motorized routes used by highway-legal vehicles
 - C. Routes designated in prior planning processes

- D. Roads with public destinations (e.g. viewpoints, ruins, towns, trailheads)
 - E. Roads that are regional connecting travel corridors
 - F. Reasonable access routes to valid and existing rights
 - G. Routes necessary for emergency or administrative
 - H. Classify these routes based on:
 - i. maintenance requirements, frequency and type
 - ii. type of suitable use
 - iii. condition – surface type and width
4. Summarize public recreation desires and current recreational opportunities
 - A. Types and quantities of motorized and nonmotorized recreation desired by the public now and in the future.
 - B. Types and quantities of recreation facilities that currently exist
 - C. Current ROS description of the landscape that quantifies motorized vs. non-motorized recreation
 5. Analyze present and predicted future fiscal and personnel resources
 - A. Enforcement capability
 - B. Monitoring capability
 - C. Maintenance capability – funds, equipment, personnel
 6. Calculate route density and quantify route distribution in comparison to:
 - A. High priority biological resource layer
 - B. High priority cultural resource layer
 - C. Watersheds with erodible soils
 - D. Watersheds with perennial water
 - E. High importance geological occurrences
 - F. Natural areas (as in 2d above)
 - G. Landscape areas not achieving standards
 7. Identify geographic subunits that constitute logical distinct recreation planning areas – summarize each subunit
 - A. Current transportation and recreation opportunities/facilities
 - B. The type and character of the experience the subunit currently offers
 - C. The resource values in the subunit
 - D. Current management – enforcement, monitoring, maintenance
 - E. The route density and distribution in the subunit, and the relationship of routes to high priority resource values
 8. Develop management alternatives. For each alternative:
 - A. Develop a visitor access vision for each subunit, derived from the overall recreation and transportation goals (step 1), considering the subunits' existing character, existing mandates to protect resources, predicted management capacity, and public desires.
 - i. Develop a desired future condition for each subunit
 - a. Define experiential conditions

- b. Define resource conditions
 - c. Identify recreation/transportation/interpretive facilities that will exist
 - d. Identify recreation/transportation facilities that will be removed
 - e. Identify management capacity requirements
 - f. Identify management style – obtrusiveness, level of development
 - ii. Develop transportation/recreation goals and objectives derived from the desired future condition
 - iii. Develop quantifiable and enforceable standards that establish thresholds that will not be exceeded – experience and resource condition
 - iv. Identify indicators that measure whether the standards are exceeded. Choose only a few indicators that are easy to measure yet reasonably indicate whether the resources or the experiences are declining or improving.
 - v. Establish monitoring plan
 - a. How often and where to measure indicator
 - b. Specify required management reaction where desired conditions are not met
 - c. Prioritize travel plan implementation under scenario of scarce fiscal resources
 - vi. Establish education and outreach plan
 - vii. Estimate fiscal requirements for full implementation
- B. Site level non-motorized route/trail assessment of baseline routes identified in Step 3.
 - i. If the answer is no to the following questions, close the route/trail:
 - a. Does the route have a publicly recognized destination or appropriate recreation purpose?
 - b. If so, does it contribute to the goals and objectives of the subunit?
 - c. If so, is the agency reasonably capable of managing visitors on and near the route?
 - ii. If any of the answers are no to the following questions, then consider closing the route or otherwise mitigating the identified impacts, including rerouting, closing seasonally, closing permanently, enhancing ranger presence, and/or education.
 - a. Does the route avoid impacts to high priority resources (Step 2 A-D)?
 - b. If so, does the route decrease the chance of non-compliance with existing conservation mandates and/or desired future conditions (see step 8A).
- C. Site-level motorized road/route assessment for baseline routes identified in Step 3.

- D. Adjust management based on results of monitoring and evaluation to better achieve desired future conditions and, in the event that fiscal resources are inadequate, implement management changes identified in Step 8-A-v above.

Appendix D: Organized Stakeholders in BRF OHV Planning

Local

Ravalli County Fish and Wildlife Association
PO Box 238, Hamilton, MT 59840

Ravalli County Off Road User Association
Victor, MT 59875
Contact number: (406)642-9824

Notes:

Based on member comments, OHV users in the valley generally advocate protecting existing access opportunities throughout the BRF. OHV users:

- OHV use is a family activity involving parents and kids together
- Desire long day trips and loops
- Desire routes for access to other activities such as fishing and picnicking
- Currently use routes throughout the valley north to south
- Desire access to scenic views and overlooks
- Desire variety of opportunities and trail types

Burnt Ridge Neighborhood Association
Darby, MT 59829
Contact number: (406)821-3344

Notes:

Concerns about OHV designation and use on NFS lands near their homes include:

- Lack of enforcement and maintenance
- Designation may increase use
- Noise
- Motorized/nonmotorized uses of the same areas
- Trails and parking lots too close to homes
- Irrigation ditches damaged by OHV crossings
- Disturbance of wildlife, especially during elk calving
- This type of use would be more appropriate elsewhere on the forest

Friends of the Bitter Root
PO Box 442, Hamilton, MT 59840,
Contact number: (406)821-3110, lcampbell@bitterroot.net

State

Backcountry Horsemen of Montana
P.O. Box 4051, Helena, MT. 59604
Contact: <http://www.bchmt.org/>

Capital Trail Vehicle Association
PO Box 5295, Helena, MT 59604-5295
Contact: Don Gordon, (406)458-9577

The Ecology Center, Inc.
314 North First Street, Missoula, MT 59802
Contact: Jeff Juel, (406)728-5733

Alliance for the Wild Rockies
PO Box 505, Helena, MT 59624
Contact: Michael Garrity, (406)459-5936

Montana Department of Fish, Wildlife and Parks
Region 2 Office, 3201 Spurgin Road, Missoula, MT 59804-3101
Contact: Mack Long, Regional Supervisor, (406)542-5500

Montana Wilderness Association
30 South Ewing, Helena, MT 59601
(406)443-7350, mwa@wildmontana.org

Notes:

This group has collaborated with the Montana Snowmobile Association and the Forest Service to develop a winter travel plan on parts of the Lewis and Clark National Forest. *For a description see the National OHV Implementation Team Case Study Report described in this report and available at:*
<http://www.fs.fed.us/recreation/programs/ohv/CaseStudyReport.pdf>

Montana Snowmobile Association
President: Chuck Beck
330 Sacajawea Peak Dr, Bozeman, MT 59718
406-587-4087, FAX: 406-585-8318,
EMail: cbpresmsa@bresnan.net
<http://www.snowtana.com/MSA/default.htm>

Notes:

This group has collaborated with the Montana Wilderness Association and the Forest Service to develop a winter travel plan on parts of the Lewis and Clark National Forest. *For a description see the National OHV Implementation Team Case Study Report included with this report and available at:*
<http://www.fs.fed.us/recreation/programs/ohv/CaseStudyReport.pdf>

Montana Trail Vehicle Riders Association (MTVRA)
P.O. Box 2884, Great Falls, MT 59403

E-mail: infoj159405@bresnan.net, <http://www.mtvra.com/>

Citizens for Balanced Use

P.O. Box 606, Gallatin Gateway, MT 59730-0606
info@citizensforbalanceduse.com

National

The Wilderness Society

Northern Rockies
503 W. Mendenhall
Bozeman, MT 59715
(406) 586-1600,
Contact: Bob Ekey

American Wildlands

40 E. Main Street Suite 2, Bozeman, MT 59715
Contact: Kim Davitt

BlueRibbon Coalition

4555 Burley Drive, Suite A
Pocatello, ID 83202-1921
Phone: (208) 237-1008, Fax: (208) 237-9424
Email: broffice@sharetrails.org, <http://www.sharetrails.org/>

Notes:

Mission statement: The BlueRibbon Coalition champions responsible use of public lands for the benefit of all recreationists by educating and empowering its members to:

- Secure, protect, and expand shared outdoor recreation access and use
- Work collaboratively with land managers and other recreationists
- Educate the general public media, elected officials, and other decision makers on recreation and access issues
- Promote equitable and responsible land management
- Affect the political and administrative process
- Support recreation on, and promote, respect for private property
- Encourage appropriate enforcement of the law

American Motorcycle Association

13515 Yarmouth Dr., Pickerington, Ohio 43147
614-856-1900, Fax 614-856-1920
ama@ama-cycle.org, <http://www.amadirectlink.com/>
President: Robert Rasor rrasor@ama-cycle.org

United Four Wheel Drive Association
7135 S. PR Royal Springs Dr.
Shelbyville, IN 46176
1-800-44-UFWDA, 1-317-729-5930 (Fax)
INFO@UFWDA.ORG, <http://www.ufwda.org/index.htm>

Notes:

The Public Process: NEPA Explained
Two documents compiled by: John Stewart for the United Four
Wheel Drive Associations are available at:
http://www.ufwda.org/pdfs/NEPA_Explained.pdf, and
http://www.ufwda.org/pdfs/Public_Process_NEPA_Explained.pdf