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File Code: 1950 **Date:** June 24, 2016
Route To:

Subject: Forest Plan Revision PIL #2

To: Lincoln National Forest Employees

Since Forest Plan Revision (FPR) was initiated in the spring of 2015, project timelines have shifted and new personnel have been hired. This Project Initiation Letter (PIL) provides updated direction for timely completion of FPR and reemphasizes this effort as a top priority at all levels of the Lincoln National Forest. Specifically, this letter outlines specific roles, responsibilities, and steps for completing the assessment report. Please become familiar with project timelines and milestones and manage your time accordingly.

File locations for the FPR include:

- Project documents including direction and guidance, examples from other Forests, and more- O:\NFS\Lincoln\Project\SO\ForestPlanRevision
- Documents and information specific to the assessment- O:\NFS\Lincoln\Project\SO\ForestPlanRevision\Assessment
- GIS products- T:\FS\NFS\Lincoln\Project\SO\ForestPlanRevision
- Reports and deliverables (section write-ups) for the assessment- O:\NFS\Lincoln\Project\SO\ForestPlanRevision\Assessment\04REPORTS
- Additional documents and information- Plan Revision SharePoint, https://ems-team.usda.gov/sites/fs-r3-lnf-fpr/SitePages/Home.aspx

Purpose and Need

The current forest plan was written in 1986 and has been amended sixteen times, the most recent in 2010. The National Forest Management Act and the 2012 Planning Rule require that all forest plans be revised at least every 15 years. In order to ensure the Lincoln National Forest is managed based on the most current and relevant science and information, the forest plan needs to be revised.

Proposed Action

The Lincoln National Forest is revising its Forest Plan. The process for developing or revising a plan includes: Assessment, preliminary identification of the need to change the plan based on the assessment, development of a proposed plan, consideration of the environmental effects of the proposal, providing an opportunity to comment on the proposed plan, providing an opportunity to object before the proposal is approved, and finally, approval of the plan or plan revision. A new plan or plan revision requires preparation of an environmental impact statement.

Currently, we are developing the **assessment report**, the first step of the plan revision process. As such, this PIL is focused on timelines and expectations for completion of that assessment. Assessments rapidly evaluate existing information about relevant ecological, economic, and social conditions, trends, and sustainability and their relationship to the land management plan within the context of the broader landscape. The responsible official shall consider and evaluate existing and possible future conditions and trends of the plan area, and assess the sustainability of social, economic, and ecological systems within the plan area, in the context ofthe broader landscape (36 CFR 219.5(a)(l)). The assessment report will provide information for 1) identifying the need for change in the plan revision process; and 2) developing plan components including desired conditions, objectives, standards, guidelines, and suitability.

The final assessment report is expected to be complete by March of 2017 (see Table 6 for a detailed timeline). Following the assessment phase, the Forest will begin revising the plan. The revision phase is expected to take two to three years, with approximate completion in late 2019. Throughout the FPR process, the PIL will be updated and reissued as necessary to communicate new timelines and direction to interdisciplinary team (IDT) members and leadership.

Roles & Responsibilities

The plan revision IDT is comprised of the Forest Leadership Team, Core Team, and Extended Team. The RO Planning Team also participates in the interdisciplinary process and provides direction and oversight of documents. Percent of duties required to complete plan revision varies by team member (Table 1) and over time.

Table 1. Approximate allocation of time by team members.

Name	*Expertise/Role*	*Percent of Time*
Forest Leadership Team	Oversight and Decisions	15%
Core Team	Forest Planner	95%
Core Team	Biologist, Ecologist, REHLM, GIS	80%
Core Team	Writer/Editor	95%
Extended Team- Resources	A-Team, Z-Team, and district	25%
Extended Team- Communications	Public Affairs	50%
Extended Team- Communications	Collaboration	25%
Extended Team- Communications	Web and Media	20%
Extended Team- Communications	Front Liners	15%
Extended Team- Logistics	Administrative Officer	15%
Extended Team- Logistics	Budget	15%
Extended Team- Logistics	Contracts, Purchasing	15%
Extended Team- Logistics	HR Support	15%

The **Core Team** (Table 2) is dedicated to plan revision until it is complete. Each Core Team member is expected to coordinate and guide assessment work with the appropriate Extended Team member(s) and counterparts (Table 3). Core Team Leaders are responsible for completing assigned sections (Table 5) of the assessment and will act as A-Team leads for their respective resources by coordinating with Extended Team members for their input (data, reports, and/or section write-ups). Core Team members are also the primary liaisons to their Forest and RO counterparts, other agencies, and the Forest Planner. Core Team members will meet on a monthly basis or as needed. Responsibilities include, but are not limited to:

- Consulting and applying agency direction (FSH 1909.12; 2012 Planning Rule; this PIL; Forest Planner, SO, RO and WO guidance, etc.) and existing examples to complete the assessment;
- Compiling, synthesizing, analyzing data for assigned resource areas/topics;
- Writing draft and final documents and maintaining records;
- Coordinating designated area evaluations;
- Communicating with the Forest Planner, Writer-Editor, RO, and FLT; and
- Participating on the Extended Team as assigned or needed.

Table 2. Core Team members.

Name	*Expertise/Role*	*Extended Team Membership*
Charlie Sharp	Forest Planner/ IDT Leader	Communications Team; all other teams as needed
David Baker	Ecologist	A-Team
Phillip Hughes	Wildlife Biologist	A-Team
Heather Berman	REHLM	Z-Team
Linda Cole	GIS Coordinator	Communications Team; all other teams as needed
Brendan Morgan	Writer/Editor	Communications Team; all other teams as needed

The Forest Planner is the IDT Leader for this project. Forest Planner responsibilities include, but are not limited to:

- Keeping the FLT informed and framing decisions to be made;
- Coordinating closely with Staff and Line Officers;
- Acting as the primary liaison for information, requests, and coordination with the RO;
- Coordinating, facilitating, and organizing the planning, analysis, and recordkeeping processes;
- Focusing tasks and milestones according to established timelines;
- Managing meetings and records (agendas, calendars, notes, calendars, follow-up, etc.);
- Communicating the "big picture" as well as specific assignments and objectives to IDT members;
- Providing key information to direct, enable, and motivate IDT members to accomplish assignments with minimal burnout;
- Planning and implementing internal/ external communications; and
- Managing FPR documents (content, quality, format, etc.) and the overall project record consistent with agency and regional direction.

The **Extended Team** (Table 3) will provide additional expertise and local knowledge required for resource analyses and input and overall support for revision efforts. Some personnel will participate on multiple teams. The Extended Team is comprised of the A-Team (ecological) and Z-Team (socioeconomic); Communications Team; and Logistics Team.

Table 3. Extended Team members.

Name	*Expertise/Role*
A-Team	
David Baker	Ecologist (Core Team)
Phillip Hughes	Wildlife Biologist (Core Team)
Aurora Roemmich	Botanist
Rhonda Stewart	Forest Wildlife Biologist
Jerry Monzingo	Fisheries Biologist
Kim Kuhar and Ryan Whiteaker	Fuels/Fire Specialists
Peter Haraden	Hydrologist
Mark Cadwallader	Partnership Coordinator
Ralph Fink	Range
Jennifer Hickman	Soil Scientist
Vacant	Silviculturist

Name	*Expertise/Role*
Z-Team	
Heather Berman	REHLM (Core Team)
Communications Team	
Loretta Benavidez	Public Affairs Officer
Peg Crim	Collaboration Specialist
Sabrina Flores	Planning & NR Staff Officer
Charlie Sharp	Forest Planner (Core Team)
Heather Berman	Recreation/Heritage/Cultural (Core Team)
Linda Cole	GIS/Web/Media (Core Team)
Brendan Morgan	Writer/Editor (Core Team)
Peggy Luensmann	NEPA Planner/D1
Ciara Cusack	NEPA Planner/D2
Eboni Griffin	Wildlife Technician/D2
Jeremy Evans	Recreation Staff/D3
Logistics Team	
Ann Tusha	Administrative Officer/HR
Marleen Moya	Budget Officer
Maria Borodko	Contracting Officer
Andrea Sepulveda	Grants and Agreements
As needed for all teams	
Loretta Benavidez	Public Affairs Officer
Peg Crim	Collaboration Specialist
Vacant	Cave Specialist
Peggy Luensmann	Environmental Coordinator

The *A-Team* is responsible for ecological-related sections of the assessment report. A-Team members will meet at designated times during the assessment phase (see Table 6). The *Z-Team* is responsible for socioeconomic portions of the assessment report including recreation, heritage, engineering, minerals, and lands. Unlike the A-Team, there are no formal set Z-Team meetings with the RO. Instead, the Forest Z-Team Lead (Heather Berman) and Extended Team members will work with the RO as needed throughout the assessment phase. Overlap and integration between the A- and Z-Team assessments will occur when assessing ecosystem services and multiple uses and their contributions to local, regional, and national economies, and when conducting the integrated risk assessment. Collective responsibilities of the A-Team and Z-Team members include, but are not limited to:

- Conducting data collection and analyses;
- Writing portions of and reviewing draft documents;
- Coordinating and communicating with A- and Z-Team counterparts at the RO;
- Communicating with line officers and the Forest Planner;
- Preparing specialist reports and submitting these to the responsible Core Team member(s);
- Reviewing maps and other products; and
- Participating in internal and external meetings.

The *Communications Team*, including members from both the SO and districts, will coordinate and assist in implementing the Public Participation Strategy for the FPR. Representatives from the SO and districts serve on this team. The Communications Team will meet on a biweekly basis or as needed.

Communication Team responsibilities include, but are not limited to:

- Leading public participation and collaboration efforts and fostering advanced methods in public involvement;
- Acquiring assistance from facilitators, frontliners, and the PAO as needed;
- Establishing MOUs and agreements as necessary;
- Conducting interagency meetings as needed;
- Handling FR notices, legal notices in newspapers of record, mailings and distribution;
- Sharing data with district contacts;
- Populating and maintaining the FPR mailing list;
- Working closely with the team to collect relevant land use/strategic plans from surrounding entities such as cities, villages, municipalities, and other agencies;
- Assisting the IDT with community conversations, listening sessions, workshops and other public meetings as needed (planning, facilitation, logistics, media, implementation); and
- Connecting with the districts by answering questions and sharing information.

The *Logistics Team* will provide administrative support for revision efforts. Purchasing, contracting, budgeting, grants and agreements and human resources provided by these personnel will contribute to the overall success of plan revision efforts.

As needed, *Other Personnel* will also contribute to the planning process (Table 4). Active participation by Forest district and other personnel is vital to the interdisciplinary process and development of a well-informed assessment and proposal. District staff responsibilities include, but are not limited to:

- Providing district data and local knowledge (e.g., stakeholders, species);
- Helping write sections of documents as needed;
- Helping develop need for change statements;
- Reviewing draft documents, maps, and products; and
- Participating in field visits, public and interagency meetings, outreach efforts.

Table 4. Other personnel to support FPR.

Resource Area	*Specialist and Office*	*Team Membership*
Frontliners	SO- Leah Roberson D1- George Garnett D2- Toby Cobb (vice Cobb) D3- Dennis Brockman	Logistics Team
Fuels/Fire Specialists	Dl- Dan Ray D2- Caleb Finch D3- Tom Barta	A-Team
Silviculture/Timber	D1- Marisa Bowen D2- Jessie Willett	A-Team
Range	Dl- George Douds D3- Vacant	A-Team
Wildlife	D1- Larry Cordova D2- Jack Williams, Eboni Griffin D3- Larry Paul	A-Team
Recreation/Lands/Minerals	SO- Vacant Dl- Christina Thompson D2- Marcie Kelton	Z-Team

Leadership and staff at all levels will be closely involved in FPR. In particular, I expect Rangers to ensure that the public and local governments in their areas have the opportunity to be involved and informed during the process. This includes participating in public meetings, keeping the IDT informed about emerging issues and working with them to resolve issues, and assisting the IDT leader by recommending and guiding public involvement. District Rangers should also be prepared to interact directly with the IDT to discuss specifics of the assessment documents, address resource concerns, and provide advice as necessary.

Staff Assignments by Assessment Topic

The planning directives (36 CFR 219.6(b)) describe the required content of the assessment for plan development and plan revision including 15 topics on ecological, social, and economic resources. Core Team members, Extended Team members and Regional and other support will work together to assess each of these topics, plus one additional topic for cave and karst resources on the Lincoln NF (Table 5). Note that RO support is available throughout the planning process and for every topic, and Core Team and Extended Team specialists should be consulting regularly with their RO counterparts for direction and guidance.

Table 5. Assessment topic responsibilities.

Topic	*Core Team*	*Extended Team*	*RO and Other Support*
1. *Terrestrial ecosystems, aquatic ecosystems, and watersheds*	David Baker (veg, soils) Phillip Hughes (aquatic, water)	Pete Haraden- SO hydro Jennifer Hickman- SO soils Aurora Roemmich- SO botany Other District personnel as needed	RO Priya Shahani- assistance with veg modeling
2. *Air, soil, and water resources*	David Baker (soil) Phillip Hughes (water) Charlie Sharp (air)	Pete Haraden- SO hydro Jennifer Hickman- SO soils Other District personnel as needed	RO Josh Hall- air quality assessment, ~ end of May 2016
3. *System drivers, including dominant ecological processes, disturbance regimes, and stressors, such as natural succession, wildland fire, invasive species, and climate change; and the ability of terrestrial and aquatic ecosystems on the plan area to adapt to change*	David Baker (veg, soils, fire insect/disease) Phillip Hughes (aquatic, water, invasive species) Charlie Sharp (climate change)	Kim Kuhar- D1 fire David Bales- SO fire Pete Haraden- SO hydro Jennifer Hickman- SO soils Aurora Roemmich- SO botany Ralph Fink- D2 range/ vegetation District personnel- as needed	RO Dan Ryerson- insect and disease assessment submitted late April 2016; RO Climate Change Vulnerability Assessment (CCVA)
4. *Baseline assessment of carbon stocks*	David Baker (veg, soils)	Craig Wilcox- SO silviculture	RO carbon stocks/ sequestration assessment
5. *Threatened, endangered, proposed and candidate species, and potential species of conservation concern present in the plan area*	Phillip Hughes	Aurora Roemmich- SO botany Rhonda Stewart- SO wildlife District biologists as needed	---
6. *Social, cultural, and economic conditions*	Heather Berman	Vice Prather- SO cultural/ historical District personnel as needed	UNM BBER Report; TEAMS Economics Report
7. *Benefits people obtain from the NFS and planning area (ecosystem services)*	**Heather Berman** David Baker Phillip Hughes	Peg Crim- SO collaboration Brenden Morgan- SO Other SO/District personnel as needed	---
8. *Multiple uses and their contributions to local, regional, and national economies*	Heather Berman	Peg Crim- SO collaboration Jessie Willett-D2 timber Ralph Fink-D2 range Pete Haraden-SO hydrology Rhonda Stewart-SO wildlife Other SO/District personnel as needed	---
9. *Recreation settings, opportunities and access, and scenic character*	Heather Berman	Christina Thompson- D1 recreation Marcie Kelton- D2 recreation	---

Topic	*Core Team*	*Extended Team*	*RO and Other Support*
		Jeremy Evans- D3 recreation Other SO/District personnel as needed	
10. *Renewable and nonrenewable energy and mineral resources*	Heather Berman	Christina Thompson- D1 Marcie Kelton- D2 Jeremy Evans- D3 Other SO/District personnel as needed	---
11. *Infrastructure, such as recreational facilities and transportation and utility corridors*	Heather Berman	Rafael Castanon- SO Vice Prather- SO cultural/historical Christina Thompson- D1 recreation Marcie Kelton- D2 recreation Jeremy Evans- D3 recreation Other SO/District personnel as needed	---
12. *Areas of tribal importance*	Heather Berman	Vice Prather- tribal	---
13. *Cultural and historical resources and uses*	Heather Berman	Vice Prather- cultural/historical	---
14. *Land status and ownership, use, and access patterns*	Heather Berman	SO L&M Specialist (vacant) Christina Thompson- D1 recreation Marcie Kelton- D2 recreation Jeremy Evans- D3 recreation	Clyde King- USDA AMS
15. *Existing designated areas located in the plan area including wilderness and wild and scenic rivers and potential need and opportunity for additional designated areas.*	**Heather Berman** David Baker Phillip Hughes	Christina Thompson- D1 recreation Marcie Kelton- D2 recreation Jeremy Evans- D3 recreation Pete Haraden- SO hydro/rivers Rhonda Stewart- SO wildlife Aurora Roemmich- SO botany Other SO/District personnel as needed	---
16. *Cave and karst resources* (additional topic specific to the Lincoln National Forest).	Brendan Morgan Phillip Hughes	Vacant- D3	---

Timeline

The PIL for this planning effort was first issued in spring of 2015. On June 25, 2015, the Federal Register Notice of Assessment Initiation was published, starting the official timeframe for the assessment phase. To complete the assessment, all ecological and socioeconomic write-ups and deliverables, including GIS maps and analyses, are due to the Core Team by September 16, 2016. An early Draft Assessment Report is due to the Regional Office for informal review by October 20, 2016. Following changes to the document based on RO comments, a Draft Assessment Report is due to the RO for formal review by November 21, 2016. Following public release of the Draft Assessment Report (DD: January 17, 2017), and public need for change meetings and documentation, a Final Assessment Report is expected to be released to the public by March 8, 2017.

Following is a timeline of key milestones (including completed tasks) for completion of the assessment phase and initiation of the revision phase for plan revision (Table 6). The Forest Planner will monitor and report progress to FLT and the RO. This timeline may change due to unforeseen circumstances such as availability of personnel, changes in policy or guidance, etc. Periodic IDT meetings and field trips will occur as necessary throughout the planning process. Workshops will also occur as necessary, particularly for vegetation specialists and vegetation modeling and the wildlife/botany specialists for species conservation list analyses. Again, the entire IDT will need to coordinate closely to ensure timely completion of the assessment.

Table 6. Timeline for completion of the assessment report and initiation of the revision phase.

Task	*Dates*
Initial PIL issued	Spring 2015 (complete)
FR Notice of Assessment Initiation and legal notice	June 25, 2015 (complete)
A-Team Meeting #1- Current Conditions	July 6-8, 2015 (complete)
Public Involvement Workshops	November 2015 (complete)
A-Team Meeting #2- Reference Conditions/Trend	January 26-28, 2016 (complete)
A-Team Meeting #3- Trend, Prelim. Modeling results, Risk, Remaining Tasks	April 28-29, 2016 (complete)
Revised PIL issued	June 24, 2016 (complete)
Update Public Participation Strategy	July 15, 2016
All ecosystem characteristic analyses complete for IDT/internal review	July 29, 2016
All ecosystem characteristic analyses submitted to RO for informal review	August 12, 2016
A-Team Meeting #4- Integrated Risk	August 29 - September 1, 2016
Ecological & socioeconomic write-ups/sections, GIS products, etc. complete and submitted to Core Team	September 16, 2016
Early draft eco./socio. assessments (& integrated risk) to RO, informal review	October 20, 2016
Draft Assessment Report and Initial Need for Change to RO, formal review	November 21, 2016
Draft Assessment Report and Initial Need for Change released to public	January 17, 2017
Public Need for Change Meetings	January 23-27, 2017
Final Need for Change Document submitted to RO for review	February 13, 2017
Regional Forester Briefing on Need for Change, intended focus of revision	March 6, 2017
Final Assessment Report issued	March 8, 2017
NOI to prepare an EIS (revision phase initiation)	March 22, 2017
Pre-wilderness inventory meetings with the public	April 3-6, 2017

Public Involvement

The Public Participation Strategy for this project identifies public involvement objectives and methods, timelines, and target individuals and organizations. This document will be updated as necessary based on public feedback and timelines. Several community conversations were held before the start of Forest Plan Revision to inform the public of the effort and ask how interested parties prefer to be involved. Public Involvement Workshops were held in November of 2015 and multiple other targeted meetings were conducted with interested parties and organizations. Public feedback/input on the assessment has been solicited, received, and organized. Public feedback will be shared with the IDT and considered by the appropriate specialists for their assessments. We will continue accepting input from the public throughout the assessment phase. Pursuant to NEPA, regulatory comment and objection periods will occur upon initiation of the revision phase and thereafter.

In addition, a mailing list has been developed and will continue to be updated as needed. All future public participation opportunities will be sent to everyone on the mailing list and will made available on the Lincoln Forest Plan Revision web site (http://www.fs.usda.gov/detail/lincoln/home/?cid=STELPRD3814307). Key information and documents will also be posted to this website.

Conclusion

This project is a top priority at all levels of the Lincoln National Forest, and I expect that each of you become familiar with the FPR process, timelines, and expectations related to your resources. It is important that you interact early and often with each other and involve the Core Team and Forest Planner in your deliberations. Please keep the Forest Planner/IDT Leader and your supervisor informed of progress and/or any challenges you may experience in meeting timelines. Where there are conflicts with other priorities, communicate as early as possible with the IDT Leader and your supervisor to resolve them.

If there is any concern or debate about what information to include in the assessment, work with the Forest Planner, Staff Officer, or RO counterpart(s) for direction. Each specialist is expected to be an analyst rather than an advocate. I know that each of you will put forth your best effort to work together, communicate effectively, and find innovative ways to accomplish this important work.

Please review the Workplan for NFIM and/or NFPN and the number of days/time you are budgeted for work on the assessment. These funds should cover some authorized travel expenses for assessment meetings. Please send what travel expenditures you incur for plan revision to the Forest Planner.

Thank you all for your participation and hard work. I appreciate your dedication to this important planning effort that will guide management of the Lincoln National Forest for the next 15 years.

Barry L Imler

BARRY L. IMLER
Acting Forest Supervisor