

Michigan Department of Natural Resources Forest Certification Initiative

Action Plan to address identified major non-conformances with standards of the Forest Stewardship Council (FSC) and Sustainable Forestry Initiative (SFI)

February 18, 2005

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STATE FOREST PLANNING:

Larry Pedersen-lead

Gaps:

Major gaps as noted at 10-29-04 and 12-16-04 briefing:

1. Inadequate strategic, long-term and landscape-level planning. (FSC 7)
2. Social impact assessments – not focused and systematic at any level within Department of Natural Resources (DNR). (FSC 4.4)
3. Environmental impact assessment – lacking at landscape level. (FSC 6.1)
4. Long-term harvest levels: (SFI 1)
 - Growth/yield models
 - Recommended annual harvest levels
 - Documentation of harvest levels against plan
5. Program to promote conservation of native biodiversity at the landscape level. (SFI 4.1)
6. Assess cover-type and habitat representation at landscape scales and incorporate findings into management activities. (SFI 4.1.5)
7. Promote continual improvement in the practice of sustainable forestry (SF) & monitor, measure, and report performance. (SFI 13):

Scoping Report Summary, General Findings:

FSC:

1. Develop mechanisms for more explicitly and systematically assessing and monitoring the social effects of state forest management decisions. (FSC 4.4)
2. Expand environmental impact evaluations to more effectively incorporate landscape scale effects and considerations. (FSC 6.1)
3. Ramp up the landscape planning process so that the plans will be completed on a much faster time schedule than is likely the case under the current level of effort. (FSC 7)

SFI:

1. Planning Issues: Gaps were found regarding SFI requirements involving long-term planning at scales larger than compartments. Clarification of planned and actual harvest levels is also needed. (SFI 1.1)
2. Management Review: Gaps were found in the management review system involving systematic gathering of information about SFI-related programs, reporting of that information to management, and formal management review. (SFI 13.1.1)

Action Plan:

1. **Develop and communicate an umbrella statewide planning framework.** A proposed framework (see below) was communicated at the Joint Management Team meeting on 1/21/05. The Forest Certification Team reviewed a description of the framework on 2/2/05 and it will be highlighted at the 2/7/05 Resource Bureau Chiefs meeting. The DNR needs to approve the framework and communicate it throughout the Department and externally by 3/1/05. Components of the framework include a statewide guidance document, ecoregional plans, and the means to expand and document long-run, landscape-level considerations in connection with operational processes.
 - a. **Develop a statewide guidance document for management of the State Forest and/or DNR lands.** The statewide plan should describe planning processes at three levels (state/department, ecoregion/district, and local/forest management unit (FMU)), describe how they are linked, provide planning templates, describe broad strategies/goals, and include timetables for

future tasks. Incorporating statewide guiding principles will supplement and enhance planning efforts at the ecoregional and forest management unit levels. A major component will be describing a multi-level management review system. This will address SFI's management review systems requirement and the process by which harvest levels are contrasted against a plan. It also addresses public reporting requirements of both SFI and FSC as well as provides a basis for additional FSC social impact assessments. The document should also knit together the wildlife conservation strategy, biodiversity conservation work, and the myriad of other plans and planning efforts that exist. Work has already begun on compiling descriptions of DNR planning endeavors; circulate completed draft by 2/15/05. Complete divisional review of draft documents by 2/25/05. Incorporate into statewide document by 3/15/05.

Development of the document needs to be spearheaded by a small (4-6 people*) committee assigned by the Resource Bureau Deputy Director. A preliminary outline of the guidance document needs to be presented to the Resource Bureau Chiefs at their 2/7/05 meeting. The guidance document itself needs to be completed by 3/25/05.

- b. **Accelerate the Eco Regional planning process** – within the context of statewide planning and expanded operational processes. The Vegetation Management Team's Planning Subcommittee and the Ecoteams review the Lake Superior State Forest (LSSF) process, define and clarify it by 3/15/05. Subsequent to this review, an action plan will be developed and approved by 5/01/05 to finish a plan for the Eastern Upper Peninsula by December, 2006 and finish plans for the Western Upper Peninsula and Northern Lower Peninsula by December 2007. The action plan will be developed collaboratively across the Ecoteams, the Planning Subcommittee, and Divisions (or Statewide Council). Some work on the ecoregional plans may begin before review or before action plan is complete to provide a basis for evaluation and assessment of realistic timetables.
- c. **Develop analyses that address long-run, landscape, and nontimber issues for use at the Forest Management Unit level.** The primary focus will be to utilize work begun by Ecoteams, Inventory and Vegetation Management Teams to establish an expanded compartment review process that addresses long-term and landscape issues. This will, in turn, contribute to the management review process. Develop the initial set of analyses and propose how they will be incorporated (process and format) into compartment reviews by February 25, 2005. Approve and develop initial set of analyses by 3/15/05. Review and finalize by 4/15/05. Incorporate review of analyses and need for revisions or additions into meetings of Inventory and Vegetation Management Teams and annual management reviews.

Additional evidence of long-run, landscape level, and nontimber considerations in our management activities will be accomplished through the development and use of a High Conservation Value Forest (HCVF) cross reference (*described under biodiversity gap*), expansion of FMU web pages, FMU monthly reports, and possibly metrics associated with the Biodiversity Atlas. The expansion of FMU web pages will be accomplished through requiring all FMUs to have them and by developing a set of topics by 3/01/05 to be incorporated into the web pages by 4/15/05. (Two topics to be stressed are socioeconomic factors and specially-designated areas/HCVF). Contents of the FMU monthly reports will be discussed at the Statewide Managers Meeting and a Unit Manager Committee will be formed to design the contents with reporting to begin by FY '06.

2. **Pursue tactics to address social impacts.** At statewide level, in addition to maintaining ongoing communications with traditional stakeholders, utilize the Forest Advisory Council for review of strategies & social impact reporting. Demonstrate and implement social impact assessments and reporting at ecoregional level. To the extent appropriate and possible, develop social data Geographical Information System (GIS) layers. Social impact assessments and reporting will be designed and developed in February, 2005 to begin implementation by April, 2005. Document social impact considerations in compartment reviews at the FMU level.

Assessment of the types of social impact considerations will be formulated in conjunction with the Inventory Team and Unit Managers. Any additional means or needs to assist in the documentation of social impact considerations during the compartment review process will be identified in February. Implementation of same or simply stressing of importance of documenting such considerations will be accomplished by State Forester and/or Field Coordinators by 3/15/05.

3. **Develop analysis, reporting, and monitoring templates of long-term forest trends and harvest levels.** Use to contrast against and report harvest levels. Involves developing explicit projections from treatment period, limiting factor analyses, past sale and inventory levels, and other information as available (e.g. HCVF bridge, assorted FMU Operations Inventory (OI)/Integrated Forest Monitoring Assessment and Prescription (IFMAP) analyses). Incorporate into annual operations and reports. Develop the analyses of timber trends and harvest projections in February (to be accomplished by new Silviculturist, Pedersen, and 2-4 others). Review by Vegetation Management Team, Forest Advisory Committee and other stakeholders in March. Determine if analyses are adequately covered in compartment review process (in conjunction with work on new long-run, landscape metrics) by 4/15/05.

Resources Needed:

Resource Bureau Chiefs/Statewide Council understanding & endorsement of Planning Approaches; assignment of committee to develop statewide guidance document

Staff:

1. Ecoteams' Assessment of Planning Framework & their role & responsibilities, including review of LSSF Planning Guide and progress on plan
2. Vegetative Management Team Assessment of Planning Framework & their roles & responsibilities, including development/review of vegetative management principles and management review/monitoring system
3. Forest, Mineral, and Fire Management Division (FMFM) – Larry Pedersen – lead, Cara Boucher, David Price, John Spitzley, Jason Stephens, Kim Herman, District Inventory & Planning Specialists, and District Timber Management Specialists,
4. Wildlife Division (WLD) –Keith Kintigh, Kerry Fitzpatrick, Michael Donovan, Penney Melchoir and Wildlife Ecologists
5. Fisheries Division (FSD) – Tammy Newcomb, Paul Seelbach
6. Michigan Natural Features Inventory (MNFI) – Advice on biodiversity metrics/analytics for inclusion in compartment reviews.

Timelines:

Develop statewide planning framework:

- 2/02/05 Refine statewide planning framework at Forest Certification Team Meeting
- 2/7/05 Present proposal to Resource Bureau Chiefs
- Feb/05 Review and Approval of planning framework
- Feb/05 Design and develop social impact assessment methods, nontimber metrics and statewide harvest level trends.
- Mar/05 Communicate approved framework to Department staff
- 3/25/05 Complete guidance document
- April/05 Implement social impact assessment models; report harvest level trends

Ecoregional Planning:

- 3/15/05 Define and clarify eco-regional planning process
- 5/01/05 Action Plan to complete Eastern Upper Peninsula (UP)
- 12/31/06 Complete plan for eastern UP
- 12/31/07 Complete plans for western UP and Northern Lower Peninsula (NLP)

FMU Planning:

- 2/15/05 Initial proposal for incorporation of long-term landscape concerns developed and reviewed by the Vegetative Management Team
- 3/1/05 Decision on how to expand FMU websites
- 4/15/05 Incorporate website revisions
- 4/15/05 Finalize proposal for long-term landscape analysis; to include analysis, reporting, and monitoring templates.
- 6/01/05 Implement proposal

BIODIVERSITY

Kim Herman – lead

Gaps:

Summary from December 16, 2004 FSC and SFI Scoping Reports:

1. Conformance to FSC Criterion 6.4 requiring a system of protected, representative, reference areas (RA) is difficult to ascertain because the old growth/biodiversity initiative is still not completed.
2. Some field units are harvesting old growth candidate areas; there is a need for direction and interim policies during this ongoing period of old growth/biodiversity initiative completion. (FSC 6.4.b)
3. Planning and public participation process for identifying reference areas is not being pursued at an appropriate pace. (FSC 6.4.b.)
4. Develop a “cross reference” document that comprehensively summarizes the various activities and programs that address the analytical, consultative and policy requirements found in FSC Principle 9 for High Conservation Value Forests (HCVF). (FSC 9)
5. Define the attributes that merit designation as HCVF. (FSC 9.1)
6. Determine presence of HCVF’s including focused consultation with outside stakeholders and compile/summarize the manner in which stakeholders have been afforded opportunities to provide input. (FSC 9.2)
7. Develop management guidelines for HCVF. (FSC 9.3)
8. Develop, document and compile in a readily accessible form, monitoring protocol and activities designed to assess the effectiveness of HCVF management guidelines. (FSC 9.4)
9. Gaps were found in planning at larger spatial scales, including assessing the representation of cover types and habitats and effectively using that information in planning. (SFI 4: on Wildlife Habitats and Conservation of Biological Diversity)
10. Field staff require additional guidance on types of stands to nominate for Biodiversity Management Areas and management practices available once areas are designated. (SFI 4: Wildlife Habitats and Conservation of Biological Diversity)

Action Plan:

1. Provide clear direction stating treatments within identified potential Old Growth (OG) areas should not occur until adoption of interim management guidelines per item #5 below. (FSC Criterion 6.4) - March 2005
2. Compile and map in GIS format existing natural areas, potential OG areas, and other federal, state, and private reserves. (FSC Criterion 6.4)– April 2005
3. Adopt a statewide biodiversity conservation planning process. (FSC Criterion 6.4 and Principle 9.0) – May 2005.
4. Cross-reference and relate our current system to HCVF definitions as used in FSC Principle 9. (FSC Principle 9 and SFI Objective 4) - June 2005
 - a. Develop a preliminary cross-reference for HCVF and catalog/assemble existing HCVF-related data in a GIS format. Also include cover types and wildlife habitat, gap analyses etc. - March 2005
 - b. Review the preliminary results with FMU staff (FMFM, Wildlife and Fisheries Divisions) with attention paid to each Unit’s relative status (with respect to all Units) and possible considerations for future designations in light of HCVF, biodiversity conservation, natural area nominations and/or other criteria including the Wildlife Conservation Strategy. – May 2005
 - c. Support stakeholder/external communications on this and related efforts such as for Action # 7 above. – June 2005
 - d. Finalize cross-reference. – June 2005

5. Flesh out management and protections options, and develop interim guidelines, for reference areas and HCVF. (FSC Criterion 6.4. and Principle 9) – April 2005
6. Initiate training on reference areas, HCVF, and biodiversity management. (FSC Criterion 6.4) – July 2005
7. Review existing biodiversity management practices and needs, and develop operational protocols.
8. Define and implement a public participation process for reference areas and HCVF (FSC Criterion 6.4 and Principle 9) – July 2005
9. Develop, document and compile a monitoring protocol and activities designed to assess the effectiveness of HCVF management guidelines. (FSC Principle 9) – June 2005
10. Update MNFI Community Classification. (FSC Criterion 6.4 and Principle 9.0) – September 2005
11. Ramp up efforts to complete MNFI systematic inventory of all state forest-lands, and include a completion schedule. Recognize funding does not currently exist to do this inventory. (FSC Criterion 6.4 and Principle 9) - March – September 2005
12. Link steps 1 – 10 above with DNR planning efforts. – July 2005

Resources Needed:

Staff:

1. FMFM – Kim Herman – lead, Cara Boucher, Richard Hausler, John Spitzley, and David Price.
2. WLD – Keith Kintigh, Kerry Fitzpatrick, Michael Donovan, with Todd Hogrefe as the link to the wildlife conservation strategy.
3. FSHD – Troy Zorn and Lizhu Wang.
4. MNFI –
 - a. Minimum needed – Information Manager for liaison on data interpretation
 - b. Very Helpful – Ecologist(s) for Community Classification update.
 - c. Most Helpful – All disciplines– to initiate inventory

Funding:

1. Added funding, and/or a reprioritizing of their contract, is needed to utilize MNFI staff as outlined above.

Timeline:

Due Date	Action	Action #
March 2005	Treatment direction for current potential Old Growth areas.	1
March 2005	Schedule for systematic natural features inventory.	10
March 2005	Preliminary cross-reference for HCVF	4a
April 15, 2005	Develop biodiversity operational protocols	7
April 2005	Management and protection options for RA and HCVF	5
April 2005	Compile/map/GIS RA and HCVF	2
April 2005	Catalog/assemble existing HCVF-related data in a GIS format	4a
May 2005	Adopt biodiversity conservation planning process	3
May 2005	Review preliminary HCVF cross-reference with FMU staff	4b
June 2005	Public participation process for RA and HCVF	8
June 2005	Support stakeholder/external communications.	4c
June 2005	Finalize cross-reference HCVF attributes.	4d
June 2005	Monitoring protocol for RA and HCVF	9
July 2005	Training on RA and HCVF.	6
July 2005	Link RA and HCVF with DNR planning efforts	12
Sept. 2005	Update MNFI Community Classification	10
October 2005	Funding for systematic natural features inventory (MNFI)	11

MONITORING

Kim Herman - lead

Gaps:

Summary from December 16, 2004 FSC and SFI Scoping Reports

1. DNR needs to ramp up its systematic monitoring activities and systematically incorporate the monitoring results into plan revisions. (FSC 8 and 8.4: Adaptive Management)
2. The level of monitoring of forest conditions is less than fully adequate because Criterion 8.1 addresses a broad range of topics that DNR does not adequately cover. (FSC 8.1)
3. Broaden the scope of information and topics that are the subject of monitoring, such as social impacts, forest condition, sites of significance to neighboring tribes. (FSC 8.2: Research and Data Collection)
4. There is a gap in monitoring of social impacts. (FSC 8.2.d: Environmental and social impacts of harvesting and other operations.)
5. DNR needs to monitor creation or maintenance of local jobs supported by activities on the state forest (FSC 8.2.d: Environmental and social impacts of harvesting and other operations.)
6. A summary of monitoring results for public review does not currently exist. (FSC 8.5: Public availability of monitoring results)
7. Many aspects are in place for Management Review and Continual Improvement System - SFI Objective 13, but DNR does not fully meet the overall requirements. Evidence of a functioning system might include: a written description of the system that includes all required elements; minutes of management review meetings; or changes in the system that followed logically from information gathered and reviewed. Need more in following three indicators:
 - a. Establish an environmental review system to examine findings and progress in implementation of SFI program, and in informing employees of changes.
 - b. A performance review system.
 - c. Formal management review for continual improvement.

Action Plan:

Some of the monitoring gaps are also addressed under the following sections in this action plan: Planning, Best Management Practices (BMP), Tribal Issues, and SFI State Implementation Involvement.

1. Develop a matrix/framework to help track and evaluate whether DNR monitoring protocols are adequate to meet SFI and FSC forest certification requirements. The work instructions for each indicator details will require information on monitoring actions, internal audit schedule and reporting requirements, and a revision history. (March 2005)
2. Review, document and assess existing DNR monitoring procedures relative to forest certification standards. (June 2005)
 - a. which/how data is captured (existing forms, databases etc.), (April 2005)
 - b. who is responsible to gather the data, (April 2005)
 - c. who processes the data, (April 2005)
 - d. where and when the data is captured and processed, (April 2005)
 - e. the format and schedule for reporting and how the data and reports are used and incorporated back into strategic or operational management decisions. (May 2005)
3. Compile information sources on how DNR monitors social impacts and develop additional protocols as needed, for example sites of significance to neighboring tribes and creation or maintenance of local jobs supported by activities on the state forest. (May/June 2005)

4. Develop a management review process for continual improvement – evaluate what you are doing and find ways to improve. (July 2005)
 - a. Identify data needed for annual SFI reporting and build tracking system. (May 2005)
5. Integrate monitoring results in plan revisions (adaptive management) (August 2005)
6. Specific operational needs:
 - a. Department level Forest Treatment Proposal (FTP) policy (FTP proposals and completion reports) to address all proposed work on state forest land. (February 2005)
 - b. Monitor and log all BMP problems and track for compliance. (May 2005)
 - c. Inconsistent practices reporting system hotline – timber sale problems, road problems, BMP problems, etc. (see I&E) (April 2005)

Resources Needed:

Staff:

FMFM: Kim Herman – lead, John Spitzley, , Pat Ruppen, Richard Stevenson, Jim Ferris, Larry Pedersen, Laurie Marzolo, Debbie Begalle

WLD: Doug Reeves, Glen Matthews

FSH: Kevin Wehrly, Todd Wills.

Timeline:

Due Date	Action	Action #
Feb 2005	Department level FTP.	6a
March 2005	Develop a monitoring matrix/framework for tracking and evaluating.	1
April 2005	Inconsistent practices reporting system hotline	6c
April 2005	Which/how data is captured (existing forms, databases etc.),	2a
April 2005	Who is responsible to gather the data,	2b
April 2005	Who processes the data,	2c
April 2005	Where and when the data is captured and processed,	2d
May 2005	Monitor and log all BMP problems and track for compliance.	6b
May 2005	Format/schedule for reporting and incorporation into strategic or operational management decisions.	2e
May 2005	ID data needed for annual SFI reporting and build tracking system.	4a
May 2005	Compile social impact information sources.	3
June 2005	Develop protocols for monitoring social impact.	3
June 2005	Review, document and assess DNR monitoring procedures	2
July 2005	Develop management review process for continual improvement	4
August 2005	Integrate monitoring results in plan revisions (adaptive management)	5

Best Management Practices

Richard Stevenson - lead

Gaps:

FSC scoping assessment comments:

1. Unauthorized Off-Road Vehicle (ORV) use could threaten compliance. (FSC 6.5.b)
2. Gap in road maintenance and management of ORV use on roads that are not being closed even if local managers wished that they could close the road. (FSC 6.5.b)
3. It takes a written order from the DNR Director to close a road, which limits field manager's ability to address problem areas. (FSC 6.5.b)
4. Road maintenance occurs primarily in conjunction with the ten year cycle (OI) which is too long of an interval if major problems develop on a site not scheduled for Operations Inventory for 5-9 years. (FSC 5.1)
5. Some BMP non-conformances were observed and DNR staff acknowledged that there are other such instances. (FSC 6.5.b, 8.2)
6. Road management maintenance systems and budgets are a concern. (FSC 5.1.c)

SFI Scoping Assessment Comments:

1. Management units do not have road management plans. Instead, roads are inventoried and planning is done as part of OI or on a 10-year cycle. (SFI 3.1.1)
2. Monitoring of roads seems to be quite variable with BMP violations observed. (SFI 3.1.1)
3. Wet weather events must be addressed. Need clarification of acceptable rutting and soil compaction. (SFI 3.1.3)
4. BMP monitoring is inadequate. (SFI 3.1.4)
5. Illegal ORV damage to wetlands is occurring. (SFI 3.2.4)
6. Contract language is not enough. Must have enforcement. (SFI 3.1.3)

Action Plan:

1. Need to track, log, and address BMP problems on roads, trails, pathways, timber sales, etc.
 - a) Develop a BMP monitoring procedure and an inconsistent practices reporting form for internal use by all Divisions.
 - b) Implement a BMP inconsistent practices reporting procedure at the FMU level, along with related spreadsheets to be completed by the FMFM unit manager, to track incoming information on high risk roads, BMP problems, inspections undertaken, and repairs made.
 - c) Develop web page for public reporting of BMP problems on forest roads.
 - d) Expand use of SFI inconsistent practices number for public 1-800-474-1718. Consider if these number is that which works best for our intent.
 - e) Review, revise and adopt existing BMP checklist for FMFM Unit staff to assess reported BMP problems.
2. Develop Training Program
 - f) Unit by unit training on timber sale contracts specifications, enforcement, petroleum leaks and spills handling, BMP guidelines, recognition, repair, and reporting of BMP problems, process to handle illegal ORV trails and problems, and OI processes..
 - g) Start review, revision and printing process for updating Water Quality Management Practices on Forest Land.

3. Develop improved methods of handling illegal activities and road closures.
 - h) Use OI process to discuss road needs and closures with improved procedures. May 2005.
 - i) Review, revise, and adopt NLP EcoTeam Road Plan statewide to include road closure processes for emergencies, seasonal closures, and weather events.

Resources Needed:

1. Selected Unit staff* to design BMP monitoring procedure and reporting form
2. Selected Managers and Unit staff* to design FMU tracking spreadsheet
3. Selected Unit staff* to review BMP checklist
4. Planners to create road review process within OI – Laurie Marzolo (lead)
5. Website design team
6. Training Officers, Department of Environmental Quality (DEQ) representatives, Recreational Specialists and ORV Techs to provide input into training needs and selected staff to conduct training on Unit basis
7. Selected members of NLP/EcoTeam, Law Enforcement Division (LED), and Managers to review and revise streamlined Road Closure procedures
8. Interaction with timber sale contract group to improve specifications - Jim Ferris
9. Interaction with monitoring group
10. Interaction with planning group (Inventory and planning specialists)
11. Interaction with Environmental Forester

* WLD: Craig Albright

FSHD: Andy Nuhfer, Darren Kramer

FMFM: Richard Haussler, Pat Ripen, Richard Stevenson, Russ MacDonald

Timeline:

1. Webpage, 800 phone number and paper reporting form by April 1, 2005
2. Reporting procedure, inconsistent practices reporting form, FMU tracking spreadsheet, and BMP checklist by May 1, 2005
3. Development of training program by May 1, 2005
4. Operation Inventory road processes May 1, 2005
5. Delivery of training program by June 30, 2005
6. Get streamlined road closure/problem resolution approved June 30, 2005

CHEMICAL USE

Jim Ferris – lead

Gaps:

1. Use of banned chemicals – stop or get derogation – World Health Organization Class 1a & 1b, and other chemical prohibited by FSC. (FSC 6.6)
2. Minimizing chemical use required to achieve mgt objectives – exceptions on certain sites and species, specifically Red Pine in NLP. (SFI 2)

Scoping Report Summary, General Findings:

FSC:

- ✓ Make sure that DNR is not using (on the state forests) chemicals that are found on the FSC list of prohibited chemicals, per Criterion 6.6

Action Plan:

1. Use of banned chemicals. FSC (6.6)
 - a. Transline. A variance (derogation) is being sought for the use of this product. Justification for the variance request is based on its use for spotted knapweed control for restoration of native grasses. Completion target Mar 31.
 - b. Chemicals used at Wyman nursery (oxyfluorfen). FSC policies on chemical use at nurseries are, by their own admission, unclear. Discussions are underway between FSC, MDNR and the auditors. These discussions will clarify the issue in coming weeks.
2. Minimize chemical use in red pine management in NLP. SFI (2.2.1).
 - a. Reiterate herbicide use in context of all regeneration efforts both natural and artificial.
 - b. Explain the decision making process and vegetation management prescription process. Emphasize that a wide array of options and perspectives from FMFM, WLD and FSHD are considered in the process.
 - c. Explain Red Pine project implications for plantation pine management and herbicide use decisions.

Resources Needed:

1. Wildlife personnel to provide documentation for derogation request.
2. FMFM personnel to analyze and report red pine artificial regeneration efforts compared to natural regeneration efforts across the state forest system.

Timeline:

1. Complete Transline derogation request by Mar 31, 2005.
2. Respond in a timely way to information forthcoming from FSC regarding chemical use at Wyman Nursery.
3. Complete analysis of artificial regeneration program by July1, 2005.

TIMBER SALE CONTRACTS

Jim Ferris – lead

Gaps:

1. Require appropriate training of contractors working on sales, including BMP, safety, and pollution control issues. (SFI 10)
2. DNR must oversee compliance with respect to health and safety regulations. (FSC 4.2)
3. Promote chain-of-custody – could be a clause in timber sale (TS) contracts to inform loggers of how or where to obtain chain of custody certificate. (FSC 8.3)
4. Best Management Practices (BMP) - “Contract language is not enough, must have enforcement.” (SFI 3)
5. Little woody debris on the ground in some areas with good chip markets. (SFI 2.3)

Scoping Report Summary, General Findings:

FSC:

- ✓ Pursue strategies for assuring a higher level of compliance with safety BMPs and regulations on the part of woods workers (logging crews), per Criterion 4.2

Action Plan:

1. Revise general Timber Sale (TS) contract specifications to incorporate Forest Certification (FC) requirements and monitoring needs.
 - a. Safety. Develop DNR timber sale safety policy requiring basic personal protective equipment for woods workers. (FSC 4.2a)
 - b. BMP’s (including spills). Develop BMP checklist and integrate it into the existing timber sale inspection process. (SFI 10.1.4).
2. Develop timber sale checklists (pre-sale and inspection) that incorporate FC requirements.
 - a. Pre-sale check list draft in place. Comprehensive checklist that covers all FC indicators relating to timber sales. (Both FSC & SFI)
 - b. Develop biodiversity checklist. (SFI 2.3.4)
 - i. Add biodiversity features to timber sale checklists. Inspect for attributes like snags, large woody debris, protection of vernal ponds etc.
 - ii. Develop woody debris guidelines. Review research on snag retention and coarse woody debris to set guidelines.
3. Train employees in contract administration, with special focus on safety, BMPs, pollution control and biodiversity attributes. (SFI 10.1.3)
4. Communicate contract policy changes to contractors.
 - a. Utilize Michigan Association of Timbermen (MAT) meetings and other methods to inform contractors of the new specs.
5. Ensure adequate training of all loggers working on state contracts. (SFI 10.1.4)
 - a. Develop a stumpage buyer training policy. Require Sustainable Forestry Education (SFE) training of all stumpage buyers.

Resources needed:

1. Team working with Doug Heym to revise Timber Sale Contract language to incorporate safety and BMP requirements.
Team: WLD- Keith Kintigh, Keith Fisher, John Niewoonder, Craig Albright
FMFM - Doug Heym, Jim Ferris
FSHD – Mark Tonello
2. Jim Ferris working with Doug Heym to develop Pre-sale Checklist.
3. FMFM and WLD Training officers plus 4 other FMFM personnel to train employees with regard to changes in Timber Sale contract and administration processes.
4. Jim Ferris to work with existing logger training and communication systems to inform loggers of new contract changes and training requirements.

Timeline:

1. BMP checklist for timber sale inspections completed by Mar 31, 2005
2. TS contract safety requirements developed by Mar 31, 2005 and communicated to MAT during spring 2005 meetings.
3. Safety requirements incorporated into TS contracts by July, 2005
4. Pre-sale checklist complete by July 1, 2005
5. Employee training complete by July 1, 2005

Forest Regeneration: Jeff Stampfly - lead

Gaps:

1. Adequate regeneration is required on artificial regeneration sites within two growing seasons following final harvest and natural regeneration within 5 years. Presently these standards are not consistently met on all sites. (SFI 2.1)
2. DNR lacks a regeneration monitoring process to document that these standards are met within the two and five year time scales. (SFI 2.1)
3. Standards that define adequate stocking levels for both artificial and natural regeneration for all cover types are lacking. (SFI 2.1.2)

Action Plan:

1. Update current policy and develop work instructions to meet certification standards:
 - a. Require that regeneration method (natural or artificial) be designated for each stand scheduled for treatment.
 - b. Require that regeneration be established within 2 years (or two planting seasons) after final harvest when using artificial methods (planting or seeding) and within 5 years when using natural regeneration methods.
 - c. Develop definitive guidelines to evaluate regeneration results.
 - d. Provide specific direction to respond to inadequate regeneration results.
2. Develop a method to track harvested stands for both artificial and natural regeneration.
3. Develop procedures for sampling natural and artificial regeneration using contractors and DNR staff.
4. Develop procedures that specify actions to take on sites that do not regenerate with preferred species within require time frames.

Resources Needed:

1. FMFM and WLD personnel* are needed to draft policy changes.
2. FMFM and WLD personnel* will develop regeneration sampling procedures and coordinate contract survey work. (*WLD: Bob Doepker, Glen Matthews, Keith Fisher; FMFM: Jim Bielecki, Don Kuhr, Bob Burnham.)
3. Training Officer may need to be involved to coordinate the training required.
4. Ron Murray in collaboration with Timber Management Specialists (TMS') will need to develop a regeneration sampling contract.
5. Additional contracting ability or Department personnel and equipment dedicated to reforestation may be needed.

Timeline:

1. FMFM Division Policy change and work instructions development can occur concurrently with other actions needed. Policy or work instructions need to be developed, personnel trained, and in place by July 1, 2005.
2. Develop a survey process to track regeneration on both artificial and naturally regenerated stands by July 1, 2005
3. Expand existing contract for regeneration surveys to include all required survey work by July 1, 2005.
4. Develop work instructions and standards to direct responses to failed or inadequate regeneration results by July 1, 2005.

TRAINING

Deb Huff - lead

Gaps:

1. Level of training on rare and endangered (R&E) plants is uneven. (Opportunity for Improvement – not a GAP) - (SFI 4)
2. Staff shall have appropriate training - (including contractors and DNR employees) so they are competent to perform their responsibilities under the SFI Objectives and Measures. Gaps were found in systems for determining training needs, and in tracking training for staff and employees.(SFI 10)
3. The training of contractors could represent a GAP, since the DNR has not required any level of training from contractors as a condition of obtaining a contract within the State. (SFI 10)
4. Staff shall be assigned and understand their roles and responsibilities under SFI. (SFI 10)

Action Plan:

Actions which require or precede formal training

- 1) Determine frequency and type of training needed for Threatened & Endangered species, to be evaluated by February 25, 2005.
- 2) Training on forest certification audit process will be conducted no later than April 15, 2005.
- 3) Training is required in Forest Certification roles and responsibilities. By June 1, 2005.
- 4) Training of employees to monitor safety, environmental standards, and BMP training for logging contractors. DNR would need to develop a policy for what parts of these laws our employees would be trained to monitor. Work instructions and checklist could be developed by June 30, 2005.
- 5) Training of contractors. DNR would need to develop contract language that requires a minimum level of training in order to do business with the State. Then, a procedure would need to be developed that informed employees of how to enforce that, whether it be a signed statement by contractors, or a requirement of a minimum level of training from other sources. Contract language, forms, and communication to employees and contractors to be accomplished by June 30, 2005.

Actions which are primarily communication

- 1) Inform all employees on aspects of FMFM Training Policy and also on how to access training information. (March 31, 2005)
- 2) Training records will be provided to Nezich and selected personnel trained in how to run reports from this database, and access to them explained. Communication on the existence of these records must be explained to the field personnel. (March 31, 2005).
- 3) Assessment of the training needs of employees by job classification should be explained to the auditors (via the Performance Appraisal system and the current Training Policy). (March 31, 2005)
- 4) Also, for the long run, an assessment as to the need for a formal listing of required courses for each job classification. (June 30, 2005)
- 5) Inform all employees on Natural areas policy & where High Conservation Value areas are. This information must be communicated as a department policy, and that all employees are REQUIRED to be aware of this policy. It is not sufficient to say that they forgot it exists.
Can be done by March 31, 2005
- 6) Once a field procedure is in place, inform all employees of their role in utilizing MNFI data on the ground. Not all employees need to be experts in all threatened and endangered species; however they are required to be aware of the potential of a site, and the procedure to follow to ensure the site is adequately examined by an expert.

- 7) Once a procedure is developed, inform all employees of DNR Safety expectations on the ground, and while administering any contractor (not just timber operators). Training is estimated for this in the table above.
- 8) Once a checklist is developed, inform all employees of their BMP responsibilities. This could be a communication or training, or both.
- 9) Once a procedure is developed inform all employees of the Division responsibility regarding Regeneration protocol.

Resources Needed and Timeline (see tables below)

- 1) **By February 25, 2005 Biodiversity conservation & Threatened and Endangered (T&E) species training - planned.** Resources: FMFM, WLD, and FSHD Training Officers, MNFI staff, Cara Boucher, Kim Herman, David Price. Hours: 240.
- 2) **By March 31, 2005**
 - a) **Training records will be provided to Nezich and selected personnel trained** in how to run reports from this database, and access to them explained. Resources: Training Officer from FMFM, WD, and FSHD. Hours: 60 hours.
 - b) **Communication on the existence of these records must be explained to the field personnel.** Resources: Training Officer from FMFM, WD, and FSHD. Hours: 24 Hours of employee time: Employee reading/understanding of these items will be approximately 360 hours.
 - c) **Assessment of the training needs of employees by job classification should be explained to the auditors** (via the Performance Appraisal system and the current Training Policy). Resources: FMFM Training Officer, Dennis Nezich, Joe Taylor. Hours: 60 hours.
- 3) **By June 30, 2005**
 - a) **Develop training listed in table below.** Resources needed to develop training before July 1, 2005. Bill Rockwell, Craig Howard, Dennis Nezich, Larry Pedersen, Fran Ryan, Doug Heym, David Price, Rich Hausler, Jim Ferris, Vicki Brown, Phyllis Higman, Laurie Marzolo, Jeff Stampfly, Ed Fredericks Hours: 424 hours.
 - b) **Employee time to participate in training:** Approximately 4680 hours of this training will be delivered to approximately 340 FMFM, WLD, and FSHD employees by June 30, 2005.
 - c) **Develop field procedures for monitoring timber sales, regeneration, BMPs and safety and to interpret/communicate these policies & procedures** Resources and hours: (Same as course developers above and additional staff). Hours: 374 hours total for approximately 30 people.
 - d) **Training of contractors; Contract language, forms, and communication to employees and contractors.** Resources: Doug Heym, Mary Cline, Jim Ferris, Cara Boucher. Hours = 60 hours.
- 4) **By September 1, 2005**
 - a) DNR employee hours to attend before September 1, 2005 = 5072 hours of training,

Timeline and Needed Resources Table for Training (Preliminary Estimates)

Due date	Required Training	Policy & Procedures Development (hours)	Course Development (hours)	Attendees	Total employee hours	Total contractor hours	Length of course (in hours)
02/25/05	Biodiversity conservation & T&E species training - planned.	120		Unit Managers, Foresters, Forest Techs, Wildlife Biologists, Wild. Techs, etc.			
04/15/05	Forest Certification Process (internal audit process)	no	40	Most FM, some WD, and FSHD	2086	88	6
06/01/05	Forest Certification Roles and Responsibilities	80	88	All FM & some WD & FSHD	1480	64	6
06/30/05	Timber Sale Safety	50	64	Unit Managers, Foresters, and Forest Techs	316	0	2
06/30/05	Timber Sale BMP protocol	58	64	Unit Managers, Foresters, and Forest Techs	224	0	2
06/30/05	Timber Sale Environmental Issues	66	68	Unit Managers, Foresters, and Forest Techs	274	0	2
06/30/05	Regeneration monitoring	50	24	Unit Managers, Foresters, and Forest Techs	300	0	2
	<i>Training Action Totals before June 30, 2005</i>	424	348		4680	152	20

Timeline and Needed Resources Table for Communication

	Communication commitments- required						
03/31/05	Inform all employees on aspects of FMFM Training Policy and also on how to access training information.	no	84	All FMFM	620	0	2
03/31/05	Inform all employees on Natural areas policy & where High Conservation Value areas are.	no	20	Land Mgmt. employees	420	0	2
06/01/05	inform all employees of their role in utilizing MNFI data on the ground	120	40	Land Mgmt. employees	420	0	2
	<i>Communication Action Totals before June 30, 2005</i>	120	144		1460		

Timeline and Needed Resources Table for Future Training (beyond Certification Audit date)

	Future Training						
06/30/05	Training of Contractors and employees regarding new contract language	40	20	Unit Managers, Foresters, and Forest Techs	230	0	2
6/30/06	Biodiversity conservation & T&E species training delivered later in year.		100	Unit Managers, Foresters, Forest Techs, Wildlife Biologists, Wild. Techs, Fish Div.	1032	72	8

TRIBAL ISSUES

Dennis Nezich – lead

Gaps:

General finding from the FSC Scoping Report:

- ✓ Explore methods of interacting with the 5 [actual number is 12] Michigan tribes that augment current methods and that helps to demonstrate a level of cooperation/collaboration that is called for in Principles 3 and 4 (FSC 3, 4)

Action Plan:

1. Invite the 12 federally recognized Michigan tribes to open house and compartment reviews, and to stakeholder meetings during eco-regional and statewide planning efforts.
2. In addition, do the following:
 - a. FMFM to host a statewide meeting with Tribal and FMFM resource field managers. All 12 federally recognized Michigan tribes will be invited. Jim Ekdahl is available to facilitate the meeting. Tribal invitations will be sent by the DNR Director.
 - b. The meeting can be scheduled as early as March. Approximately 45 days of lead time is required.
 - c. Purpose of the meeting is to:
 - i. Establish personal contact with each of the tribes.
 - ii. Familiarize tribal representatives with the Compartment Review process and their potential role in the process.
 - iii. Briefly explain forest certification and the standards we need to comply with.
 - iv. Demonstrate a level of cooperation and collaboration that is called for in FSC Principles 3 and 4.
 - v. Identify an effective means of interacting with the Michigan tribes in the context of tactical land management planning.
 - vi. Create an index in consultation with the tribes that describes their items of concern and their geographical area of interest

Resources Needed:

1. DNR representation to include:
 - a. Deputy Director Jim Ekdahl
 - b. FMFM Field Coordinators
 - c. FMFM District Managers
 - d. Four FMFM Unit Managers, two from the UP and two from the NLP.
 - e. WLD representatives as assigned by the WLD Field Coordinator.
 - f. One Fisheries Division (Steve Scott) representative who is knowledgeable with forest certification.
 - g. Representative from State Historical Preservation Office.
 - h. FMFM and/or WLD planner.

Timeline:

Conduct meeting in May or June.

SFI Involvement

Bernie Hubbard/Dennis Nezich – lead

Gaps:

General findings from the SFI Scoping Report:

- ✓ SIC and other SFI-tasks: Gaps were found regarding the assignment of SFI responsibilities, significant involvement in the Michigan State Implementation Committee (SIC) and in technical areas involving reporting requirements under the SFI Program. (SFI 12)

Action Plan:

1. Involvement with SFI Implementation Committee.
 - a. Attend semi-annual meetings of SFI State Implementation Committee.
 - b. Participate in SIC subcommittees including:
 - i. Loggers Training Subcommittee – includes participation in the formulation of training requirements for SFE certified loggers, and participation in conducting training sessions.
 - ii. Inconsistent Practices Subcommittee – participate in subcommittee oversight of reporting system procedure, and cooperation in the investigation of reported inconsistent practices in each of the five SIC Districts.
 - iii. Communications (public outreach) Subcommittee – involvement with making the general public aware of forest certification and the benefits of sustainable forestry.
 - iv. Annual Report Subcommittee – annual reporting of information required by SFI.
2. Participation in use of the SFI inconsistent practices reporting system (800 number) to address concerns raised by loggers, consulting foresters, employees, program participants, and the public. This reporting system is currently in place and is operated by the Michigan Forest Products Council and Michigan Forest Resources Alliance. Identify process to receive and respond to public inquiries.
3. Report annually to the SFI Program on compliance with the SFI standard.
 - a. Prompt response the annual SFI annual progress report survey questionnaire.
 - b. Record keeping for all categories of information needed for SFI annual reports.
 - c. Maintain copies of past reports and document progress and improvements to demonstrate conformance to the SFI Standard.
4. Establish a management review system to examine findings and progress in implementing the SFI Standard, to make appropriate improvements in programs, and inform employees of changes.

Needed Resources:

1. FMFM Assistant Chief and/or FMFM Forest Certification Specialist to attend SIC meetings and ensure participation in SIC subcommittees.
2. District Forest Managers to assign appropriate staff to investigate reports of inconsistent practices.
3. FMFM Forest Certification Specialist to collect information for SFI annual reports and respond to annual progress questionnaire.
4. Senior management to meet annually to examine progress in implementing Forest Certification Standards, make improvements to programs, and identify how to keep employees informed of program changes.

Timeline:

1. Attendance at SIC semi-annual meeting and subcommittee meetings has started.
2. Reporting activities to commence upon award of SFI certification.
3. Management Review process to commence following the internal audit.

Forest Certification Web Site

Kim Spiker and Larry Pedersen -lead

Needs:

1. Need to organize and present evidence in support of the certification audits.
2. Need a method to reference policies, procedures, and operational guidelines according to the two certification guidelines.
3. Need to provide a single authoritative reference point for auditors, DNR personnel, and the public for DNR policy, procedure, and work instruction.

Action Plan:

1. Continue to develop the current “State Forest Certification” webpage content and format. The Forest Certification (FC) Website is essential for the organization of evidence in support of the certification audits. This material is numerous, diverse, scattered, and changes frequently. Much of it is already available on the DNR website. However, the FC website is necessary for referencing these materials according to the outlines of the two certification standards, and potentially to a more comprehensive overview in a complete environmental management system (EMS). The website will avoid duplication and confusion over “most current version”, and will provide one authoritative reference point for auditors, DNR personnel, and the public.
2. Keep an up-to-date copy of each standard on the website and provide links to the relevant DNR policies, procedures, plans, and audit evidence. *Kim Spiker by 1/31/05*
 - a. The FSC Lake States Standard is final and is not expected to change, so Kim can be working on this for now.
 - b. Use the SFI 2005-2009 version.
 - c. The EMS links can *wait for now*. *Craig and Bill, if and when Enhancement Option #2 is approved by the Department of Management and Budget.*
3. Link the FC Website to the DNR webpage sooner rather than later (eventually as the State Forest Management website). With feedback opportunities provided, this will be evidence of a “social impact assessment” system. *Larry – get Management Team approval by April 1, 2005.*
4. Conduct a forest certification indicator assessment. Assign each indicator of each certification system to *a person* to:
 - a. identify and analyze evidence, and submit it to Kim (first cut) *by 1/31/05*,
 - b. develop additional evidence as needed *by 2/28/05*,
 - c. identify any training needs necessary to implement the evidence *by 2/28/05* , and
 - d. identify and/or develop monitoring protocols to ensure that compliance with the indicators is met *by 3/31/05*.

The Forest Certification Implementation Team assigned people on 1/13/05; assigned people report all of above by April 1.
5. Input and link conformance evidence to the two FC standards. *Kim – Continuous from now until the audits. This will probably be about a quarter-time effort for Kim, or half-time if CD’s are required (i.e., 2-4 person-months).*

Resources Needed:

1. FMFM Larry Pedersen to be assigned responsibility for oversight and management of the FC website. Forest Consultant Bill Rockwell will assist.
2. FMFM Kim Spiker to design, organize, and develop the FC website.
3. FMFM John Spitzley, Joe Taylor, and David Price; WLD Mike Donovan, and Fisheries Division Erica Moore will assist with website content.
4. DIT John Carey will assist with data management.
5. Numerous DNR staff will contribute to in fine indicator assessment involving the following elements which the FC consultant will review:
 - a. Assignment: Who is doing the work at each stage: (i.e. initial evidence collection, analysis, work plan construction, work instruction development, approval)
 - b. Evidence: Identify policies or procedures that are currently in place, or describe practices or activities that are currently conducted, that address this indicator.
 - c. Analysis: Does the evidence consistently and completely address the indicator? Is it consistently applied across state forests? Is additional evidence required? Is it necessary to consolidate the evidence?
 - d. Work plan: List the leader, work steps, resources and timelines to complete a work instruction.
 - e. Work Instruction: (Operational guidelines or practices)
Title; Date; Purpose; Scope; References; Responsibility; Instruction; Records; Required training/skills; Monitoring; Internal Audit; Revision history.

Timeline:

1. November 2004 through March 2005 – Using the current website format, link DNR land management activities to current policies, procedures, operational guidelines, work procedures, etc.
2. January 2005 - The final SCS (FSC) and NSF (SFI) scoping reports should be put on the website to provide access to them (each including their current standards).
3. February 2005 – Put two copies of the Forest Certification Standards on the website (one to link to relevant policies, procedures, work instructions, and evidence; the other to stand alone).
4. February 2005 through April 2005 – Link fine indicator assessments to Forest Certification Standard indicators.
5. February 2005 through July 2005 – Link Forest Certification Standard indicators to DNR policies, procedures, operational guidelines, etc.
6. By April 1, 2005 - Link the FCIT Website to DNR webpage, with provision of feedback opportunities.