

C5 FOREST MANAGEMENT PLAN 2006–2026

APPENDIX 2. TERMS OF REFERENCE

C5 Forest Management Unit Forest Management Plan



Terms of Reference

April 8, 2002

**Alberta Sustainable Resource Development
Southwest Region**

Attention Participants:

The attached terms of reference outlines the framework through which a forest management plan (FMP) will be prepared by Sustainable Resource Development (SRD) for the C5 Management Unit. The FMP will provide management direction through the identification of work plans that will be undertaken to meet identified objectives that define the preferred future forest condition.

The C5 FMP will utilize the information from the current strategic plans (examples: Sub-regional Integrated Resource Plans, Forest Land Use Zones) and other background information in the defining of operational targets and related tasks.

The development of this FMP will include identification of a number of compartment teams identified in Section 7, Roles and Responsibilities. In addition consultation / communication with representatives of SRD, and other government Departments /Agencies, are listed under Section 8 "Technical Support."

There will be a public information and consultation process (Section 9) that will involve user groups and the general public who have a vested interest in the planning area.

Your careful review and participation in the development of the C5 FMP will be appreciated.

Sincerely,



Darryl Johnson
Senior Operations Manager



Rick Blackwood
Area Manager
Southern Rockies

Approval Statement



We the undersigned have read the Terms of Reference for the C5 FMP and endorse the development of the plan.

We would like to extend a welcome and encourage all department personnel involved in the C5 FMP to participate with enthusiasm.

Doug Sklar
Director, Forest Management

Jerry Sunderland
Director, Forest Operations

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1.0 Introduction

The C5 Forest Management Unit is located in the south west corner of the province of Alberta. The management unit occupies 3,522 square kilometers of the Rocky Mountain Forest Reserve Lands north of Waterton National Park and south of Kananaskis Country. This area has received considerable attention with respect to a broad range of land management issues. The issues for this area are wide ranging. Public pressure, recent Energy and Utilities Board hearings and other large scale planning reviews (e.g. NRCB report for Vacation Alberta) have indicated that new approaches and a comprehensive land management strategy that minimizes impacts and ensures sustainability must be developed and implemented.

Although a number of areas such as the Castle have been selected as high profile within the C5 Forest Management Unit, the Castle and other similar areas do not stand alone in their profile, but are part of a larger network along the Eastern Slopes of southwestern Alberta. The area of the C5 Forest Management Unit is all quite similar and the land management issues are the same throughout. Therefore any land use planning strategy must consider and take into account the entire area plus consider its management implications on adjacent management areas. There may be areas within the management unit that may have site specific needs or issues, but land management strategies must be inclusive for the entire planning area.

The C5 forest management area is all within two hours driving distance of a population exceeding 1 million people. The majority of these people live in urban centers and value this area for its recreation values. However, it is also an area that supports a wide range of important provincial industries including agriculture, oil and gas, timber, coal and mineral exploration. The majority of these activities are rurally based and they provide employment to the rural communities, as well as the products required by the urban populations. The area is also the source of water for much of southern Alberta and parts of the other prairie provinces.

2.0 Outcome and Purpose

The pressures and demands on this landscape are immense; they can only be expected to grow as populations increase, and with them the demands for recreation and natural resources. This necessitates that a broad but operational strategy or framework be established for the entire C5 Forest Management Unit, in conjunction with adjacent management units.

Sustainable Resource Development, the land manager, has undertaken this initiative and is responsible for the development and implementation of the C5 FMP.

The goal of this plan is to define a desired future forest state for the C5 management unit that demonstrates sustainability of the forest ecosystems, diverse social and economic benefits, today and tomorrow, through operational forest management systems and adaptive management.¹ This goal can be further clarified with a purpose statement.

¹ Criteria and Indicators of Sustainable Forest Management In Canada. National Status 2000, Canadian Council of Forest Ministers Pg. 1v

The purpose of the C5 FMP is to:

- Identify goals that define the preferred future forest and the objectives and targets (operational activities) required to manage the forest area on a sustainable forest management basis.
- Recognize resource values, uses, and activities, including Aboriginal uses, on the landscape within the framework of the Alberta Advantage.
- Identify sustainable timber harvest levels, or Annual Allowable Cut (AAC) for a period equivalent to two forest rotations.
- Provide the context for the development of Regional Timber Harvest Planning and Operating Ground Rules that are to be produced before 2006.

3.0 Scope of the Project

This project will address:

- Public lands within the Green Area (Forest Reserve) of the C5 management unit.

This project will not:

- Provide direction for the management of protected areas;
- Pertain to the White Zone public areas; or
- Affect deeded land.

4.0 Linkages to Integrated Resource Management (IRM)

The C5 FMP will be linked to the IRM initiative. Clearly operational directions must align with existing legislation and policy positions. In some cases evolving processes that may change policy or legislation may be carried out in parallel. This is the case with the C5 FMP and the Provincial IRM initiative. It is imperative that these processes are not contradictory and in fact are complementary, with the IRM providing strategic and the C5 FMP providing operational direction. It is recognized that in developing a FMP following Provincial forest management guidelines for preparation of FMPs, there is a need to look beyond yearly operational activities. This is the case for timber supply analysis and could be the case for access development planning. To ensure coordination between these operational and strategic initiatives a liaison between the writing team and IRM administrators will be established.

5.0 C5 FMP Format / Structure

The intent is to frame the text in such a manner that it is compatible and aligned with the Canadian Standards Association (CSA) Sustainable Forest Management (SFM) system for certification. SFM system standards are to be used as a tool by organizations to continually improve their management system and to ensure field performance is consistent with the goal of sustainable forest management. Although SFM certification will not be sought immediately, adherence to as much of the structure, concepts and philosophy of CSA SFM is viewed as appropriate for the C5 FMP.

6.0 Background

6.1 Policy Context

The C5 FMP will be developed recognizing *Alberta's Commitment to Sustainable Resource and Environmental Management* and the *Forest Legacy* document.

There are a number of principal land use policy documents pertaining to the planning area. These are the Cabinet-approved *Castle River Sub-Regional Integrated Resource Plan* (1985), *The Livingstone Porcupine Hills Sub-Regional Integrated Resource Plan* (1987), *The Crowsnest Corridor Sub-Regional Integrated Resource Plan* (1991), *A Policy for Resource Management of the Eastern Slopes: Revised 1984*, and *A Coal Development Policy for Alberta* (1976).

While land use and related access is expected to conform to the management direction and zoning as set in the Integrated Resource Plans (IRP), recommendations may be made to revise or update these plans. Any recommended deviations from existing policy will be duly noted and forwarded to the appropriate level for further consideration.

Provincially SRD has developed a Forest Management Planning Manual, which identifies guidelines for forest management plan development. This manual is under revision and the C5 FMP will use the most current version drafted in 2002. In the interim the draft version dated April 1, 2001 will be consulted.

Legislated Areas

Although much of the planning area is not designated under legislation, there are two Forest Land Use Zones (FLUZ) that are designated and managed under the *Forest Land Use Zone Regulations*. These FLUZs include: Castle Special Management Area FLUZ and Allison FLUZ.

In addition to the FLUZs, there is one protected area established under the *Parks Act*, the Bob Creek Wildland Provincial Park. There are also two Natural Areas and three Ecological Reserves designated under the *Wilderness Areas, Ecological Reserves and Natural Areas Act*. These are: Mount Beehive Natural Area, Mount Livingstone Natural Area, Westcastle Wetlands Ecological Reserve, Plateau Mountain Ecological Reserve, and the Upper Bob Creek Ecological Reserve.

Dispositions and Tenures

Industrial commitments are another important consideration in the planning process. The oil and gas, forestry and livestock grazing industries are the three major active industrial commitments in the planning area. There are also a substantial number of areas where subsurface mineral rights are held as freehold. Although these areas are not currently active, the freehold nature of these lands requires that these rights be acknowledged as commitments in an operational plan.

In addition to various provincial policy documents, there are also many provincial statutes, associated regulations, codes of practice, and guidelines that affect land and resource activities within the planning area.

6.2 Site Description and Boundaries

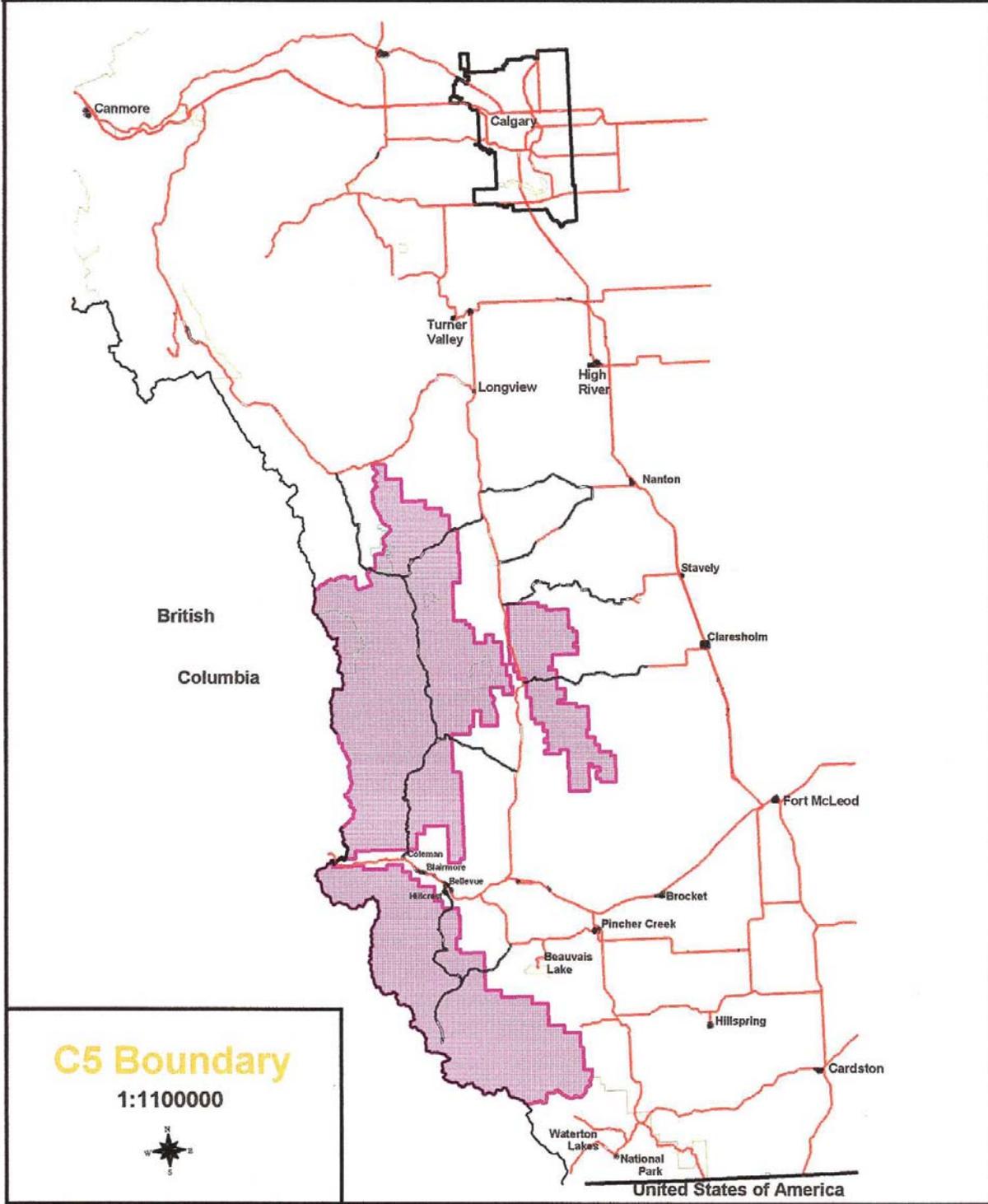
The planning area (Figure 1) consists of the Rocky Mountain Forest Reserve Lands north of Waterton Park and south of Kananaskis Country. The Area is bounded by the B.C.-Alberta border at the Great Divide on the west and the White Zone settled land of Alberta to the east. The vast majority of this unit is contained within the greater Oldman watershed basin. This area can be broken down into four distinct geographical areas. They are the Castle, the Crowsnest Corridor, the Livingstone and the Porcupine Hills. The total area of the planning area is 3,522 square kilometers.

Natural Regions Description

According to the *Natural Regions and Subregions of Alberta*, the planning area includes representation from three natural regions and five natural subregions from within these natural regions. The Rocky Mountain natural region is represented by the montane, sub-alpine and alpine subregions. The Parkland natural region is represented by the foothills parkland subregion and the Grassland natural region by the foothills fescue subregion. Three natural regions and five subregions being expressed in such a small area is one of the reasons for the large amount of biological diversity in this area.

There is a progression of Natural regions and subregions that is related to terrain and climate. The Grasslands are found on the driest sites, whereas the parkland is located in the foothills area where moisture regime and microclimate increase the possibility for tree growth. The montane is likely the most diverse subregion and exhibits an extremely diverse mosaic of grasslands, shrublands and deciduous and coniferous forest. The subalpine is dominated by forest and the alpine subregions are high elevation locations above the treeline.

Figure 1 - C5 Forest Management Unit



6.3 Issues Overview

There are a number of land and resource concerns that have to be addressed. Some of the most significant themes and the issues associated with the theme are listed below:

1. **Coordinated Landscape Planning.** All activities from recreation to industrial development require access. However, access also leaves a major footprint on the landscape that can affect the other resource users' opportunities and requirements from that same landscape (timber sustainability, wildlife habitat, recreation values, livestock management etc.). Access management needs to focus on minimizing the amount and footprint of access required. Access must also be coordinated with other stakeholders in order to optimize new and existing road developments. There is also a need to look at access rights (industrial and public) and establish criteria regarding long-term and short-term access and secure legislative support for restricting some access activities in a manner similar to the Castle Sub-regional Integrated Resource Plan, for the entire C5 management unit.

Land use management strategies must consider how coordination can be achieved to reduce the impact and ensure that the integrity of both the landscape and the important renewable resources can be maintained as sustainable.

2. **Watershed Management.** The C5 management unit contains the entire Oldman (basin headwaters) watershed. Not only is this watershed important for many of the values present in the management unit, it is also depended on by downstream communities and for irrigation throughout southern Alberta into the other prairie provinces. Issues such as peak flows, beneficial release and water quality are all important. These are achieved through successful riparian area management, careful design and construction of road developments, stream crossings, and other surface disturbances.
3. **Biodiversity and Wildlife Habitat.** Many of the issues outlined above are the major factors that could affect biodiversity and the effectiveness as well as the amount and connectivity of wildlife habitat. The planning area is known for its wide range of biodiversity, which is closely related to the complexity of the landscape. Addressing the above issues will help to ensure these values are maintained; however, these two values must be employed as measures in evaluating the successful management of the other issues.

The C5 management unit is a small management unit within a much larger landscape that includes British Columbia, National Parks and several other administrative jurisdictions in the United States. Connectivity of habitats both within the planning area and between it and other areas is critical for the management of large carnivores such as grizzly bears and wolves.

4. **Oil and gas exploration and development.** There are extensive reserves of natural gas within the C5 management unit. Although the Waterton gas field is considered mature it is still considered one of the largest gas reserves within the province of Alberta. These reserves extend northward throughout the C5 management unit. These reserves have not been easy to access and environmental issues have to some extent hindered development. However, new technology and high gas prices have renewed interest in developing these fields. Access, aesthetics, wildlife habitat impacts and the impacts on other stakeholders must all be considered.
5. **Mineral exploration (primarily coal).** The C5 management unit overlies extensive coal deposits, for which most of the mineral rights are privately held. It has generally been considered over the past 25 years or more that the development of these reserves would be unlikely. However, current energy demands and high prices for energy may make extraction or use of this resource more attractive. Development of this resource would have substantial impacts on other stakeholders and resource users.

There may also be development of the coal-bed methane (CBM), a form of natural gas trapped in the coal seams. CBM production involves substantial production of fossil water in order to release the gas.

6. **Timber.** The timber industry is a major stakeholder in the C5 management unit. However, its activity can affect many of the components on the landscape. Done well, benefits can be achieved. However, in order to achieve this level of management a great deal of knowledge and understanding is required. The management activities and operating criteria must also be economically feasible.
7. **Range.** The livestock industry of southwestern Alberta depends heavily on the planning area for livestock range and forage. There are impacts from the use of this resource, and the impacts depend on the level of management and the type of management done. Range and riparian health maintenance and enhancement should be the focus.
8. **Recreation.** Recreation also puts extreme demands on the landscape. The impact of these demands is most likely the one that is most poorly understood. The most obvious impacts are those from off highway vehicle activity (erosion, sedimentation, damage to vegetation etc.) and random camping (damage to vegetation, human waste, garbage, etc.). However, all aspects of recreation have an effect on the landscape and the impacts related to the type of recreational activity need to be better understood.
9. **Aesthetics-** Visual values are increasingly important and there is a desire to ensure aesthetic qualities are considered in developments of any kind.

10. **Forest protection and management of invasive nonnative species (noxious weeds and aggressive agronomic invaders).** The proximity of the C5 management unit to other jurisdictions with noxious weed problems, a favourable climate, and a long history of human involvement that includes the introduction of invasive agronomics has created a situation that cannot go unaddressed particularly when new disturbances are being planned. Noxious weeds not only threaten the agricultural industry; they also threaten the ecology, habitat values and biodiversity of the area. Control and prevention strategies for restricted and noxious weeds are critical. Management strategies must also focus on controlling and preventing the further introduction of invasive forage crops such as Timothy and Smooth Brome.

A maturing, dense even-aged forest canopy covers the central ridges of the C5 management unit area. Primarily coniferous, this canopy provides continuous fuels capable of sustaining crown fires. FireSmart Forest Management will be integrated into the timber supply analysis to assist managers in identifying locations where forest modification (selective removals, stand conversion) could occur that may limit crown fire spread and provide beneficial wildlife habitat.

As they mature, these coniferous stands are also increasingly vulnerable to disease and insect infestations, such as Mountain Pine Beetle, which is endemic in the area and periodically epidemic. Management strategies such as sanitation cuts or prescribed burns may be necessary to control such threats.

11. **Forest Certification.** A final issue that requires attention is global in nature. Sustainable Forest Management Certification is desirable and has not been achieved for any forest management unit fully managed by The Province of Alberta (i.e. SRD as the land manager, rather than the holder of a Forest Management Agreement). Industry is leading the way for certifications and it is the desire of SRD also to work towards developing a management plan that is supportive of (does not impede) certification criteria.

7.0 Staff Roles and Responsibilities

The following teams, committees, or working groups will be involved in the project:

C5 Project Management Team

Land and Forest Division Directors (Forest Management, Forest Operations) and the Area Manager will provide leadership, general direction, make recommendations, and resolve issues.

Planning Team

Key agency staff will be responsible for determining the structure and for drafting and editing the C5 FMP. This team will consult with Technical Support personnel, the Advisory Committee, stakeholders and the general public.

Technical Support

Professional resource staff will supply necessary information, planning proposals, and advice to the Planning Team.

Advisory Committee

Individuals that collectively represent a wide range of interests will form an advisory committee that will ensure that stakeholder and public views are understood and recommendations are clearly articulated to the planning team. This group may also be invited to monitor implementation.

Stakeholder meetings

Through the public consultative process stakeholder representatives, having a vested interest in the outcome of the project, will be invited to attend special meetings to provide information, feedback, and advice to the Planning Team through the advisory committee.

The project administrative hierarchy is illustrated in Appendix 1.

Roles and responsibilities for the Alberta Sustainable Resource Development Planning Team are as follows:

Project Manager

Principal media contact
Oversee process and timelines

Project Coordinator

Chair of Core and Technical Team
Prepare project terms of reference
Develop process and timelines
Contact for contract editor, & public facilitator
Help facilitate formation of stakeholder committee
Government representative on the advisory committee
Guide and oversee daily operations of the process
Prepare draft plan at direction of planning team and stakeholder committee
Secondary media contact

Planning Team

1 Representative from Land and Forest Division
1 Representative from Forest Management Branch (Edmonton)
1 Representative from Land Administration Branch
1 Regional Planner (SRD)
1 Representative from Fish and Wildlife Division

Primary responsibilities will include establishing the format for the plan and coordinating and editing additions to the plan.

Decisions will be made through a shared decision making process.

Administrative Support

Book meeting venues, payments
Arrange hosting with public facilitator when required
Co-ordinate mail outs, distribution of minutes, summaries
Attend planning meetings and prepare minutes of those meetings
Work closely with the planning team and project co-ordinator

Public Communication

Work with the public facilitator and project co-ordinator to develop a communications plan for the project.
Develop fact sheets, newsletters.
Co-ordinate the development and approval of a project web site. Since the Castle web site is established and the Castle FLUZ is included in the plan, this web site will be utilized.
Co-ordinate news releases, newspaper advertising and approvals.

Facilitator

Work closely with the project manager and coordinator to manage the public consultative process.

Implement an interest-based consultative process for stakeholders. Facilitate open houses and advisory group meetings, and summarize information from these meetings.

Data Maintenance and Production

Produce and manage GIS products required for the process and final product

Timber Supply Analysis

Work with the project coordinator to develop a 'base run' of the timber supply. Evaluate identified models as they relate to stand sequencing from the base run. Complete timber supply analysis based on objectives of the C5 FMP.

Graphic Design

Work with the project coordinator and editor to complete the layout, design, and production of the draft and final version of the plan.

Budget Control – Brenda Ulmer

Finance management for project and contracts.

8.0 Technical Support

Technical support personnel will fulfill the information needs of the planning team, Advisory Committee, Stakeholders and general public. Individual team members may be requested to make presentations to convey information on their area of expertise. Technical support will be provided by representatives from the function areas listed below on an 'as need' basis working closely with the facilitator, project coordinator and project manager.

1) SRD

- Fisheries
- Wildlife
- Ecological Range Management
- Forest Management Group
- Fire
- Forest Health
- Environmental Law
- Public Lands (White Area)

2) Other Departments/Agencies

(specific participants to be assigned by each agency)

- Energy
- Community Development
- Alberta Infrastructure
- Parks Canada
- Alberta Environment Water
- Protected Areas
- Municipal District Pincher Creek
- Municipal District Ranchlands
- Municipality of Crowsnest Pass
- Municipal District of Willow Creek

Committees and teams involved with this project will make decisions through a shared decision making process as defined in the glossary of terms.

Issues that cannot be resolved will be taken forward to the next level in the project administrative hierarchy as illustrated in Appendix 1.

9.0 Public Participation and Communications

Alberta Sustainable Resource Development recognizes the importance of involving all user groups and the general public who have a vested interest in the planning area. This includes other levels of government, and Aboriginal peoples.

A facilitator will work closely with the planning team to identify and define appropriate public consultative processes, including an advisory committee and meetings with stakeholders and the general public.

Advisory Committee – members will be derived from the public who broadly represent the needs and perceptions that must be included in the plan. Members will monitor the stakeholder and public meetings and help to identify issues, criteria and options that need to be considered by the planning team.

Stakeholder meetings, comprised of identified groups or individuals with a vested interest in C5, will occur to facilitate the sharing of information, provide constructive alternatives, and comment on the draft proposal as it is being developed.

The general public will have access to information as well as the planning process through attendance at “Open House” presentations, and through the use of communication vehicles such as an interactive web site, and newsletters. A communications plan will be developed that will focus on opportunities and tools to enable the public to provide input to the process. Public open houses and workshops may be held at key points during the planning process culminating with development of a draft plan.

Information generated through the public meetings and advisory process will be provided to the project planners who will incorporate, where practical the recommendations into the draft plan. Where recommendations are not practical the planners will provide justification to the advisory committee.

A draft C5 FMP will be submitted for review and approval to the following:

- The Directors of Land and Forest Division, Forest Management and Forest Operations Branches (initial review); and
- The Assistant Deputy Minister of Land and Forest Division (final approval).

The draft plan will be accompanied by recommendations for implementation, which may include changes to existing legislation / government policies.

10.0 Process and Timeline

Project Stage	Anticipated Timeline
Compile information, documentation, models	Dec. 2001-January 2003
Develop Terms of Reference; confirm membership of project committees, teams and working groups	January 2002
SRD Directors endorsement of Public Involvement Strategy	January 2002
Public Participation(CROW PAC, Stakeholder and Public meetings)	January 2002 to December 2003
Confirm structure/format/component parts of C5 FMP	February 2002
Terms of Reference approval	April 2002
Development of draft plan (confirm issues, resolve issues, develop objectives/strategies/actions/targets, obtain feedback from participants)	April 2002 to January 2003
SRD Directors endorsement of draft plan	January 2003
Complete Timber Supply Analysis	April 2003
Public review of draft plan	April 2003
Revision of draft plan	May/June 2003
Submission of recommended changes to legislation(if required)	January /2004
Director level approval of final plan	July 2004
Final approval and signoff	January 2005
Complete Regional Operating Ground Rules	January 2006
Plan implementation	May 1, 2006
Stewardship reporting	every 5 th year (2011)

11.0 Project Tasks

Appendix 3 provides a partial list of tasks envisioned for this project. Additional tasks and processes may be required and will be clarified as we proceed.

Appendix 1 – Glossary of Terms

Value

A specific characteristic or quality considered by an interested party to be important (i.e. ecosystem diversity or timber).

Objective

A broad statement describing a desired future state or condition of a defined forest area (in this case C5).

Target

A specific statement describing a desired future state or condition of a defined forest area (in this case C5).

Shared Decision Making (SDM)

Motivated by consensus; however, the main aim is “to establish ownership of change as an expedition”². Each party is encouraged to mutually present, exchange and advance ideas so that in the end a series of small agreements is reached towards a common goal.

Indicator- A variable that measures the state or condition of a defined forest area (in this case C5).

² McMillian Bill and Stephan Murgatroyd “Opening The Door -Improving Decisions Through Public Consultation” Pages 54 &99, Dark Horse Books. Edmonton ,Alberta Canada.1994.

Appendix 3 – Project Tasks

Identification of Core Team Members and Responsibilities:

1. Identify the core team and clarify responsibilities and authorities.
2. Identify the technical support participants.
3. Ensure that the working team and support staff are issued an introductory memo from SRD executive on the priority of the project and forecasted time lines.

Clarify the Terms of Reference

- Obtain buy-in and approval of the Terms of Reference from Edmonton SRD.

Timber Supply Analysis

1. Assess Model Choices
 - Choose the spatial model to be used
 - Identify model run input criteria, green up constraints, others
 - Identify all predevelopment inputs (unique spatial themes and glean information from the Southern Rockies Landscape Pilot Project report where practical)
2. Landbase Determination
 - Ensure inventory is an approved version
 - Landbase determination - Review 1986 version
 - Proposed new document (subjective deletions)
 - Review proposed netdown document with quota holders
 - Confirm spatial data is suitable (private land, leases, elevation models, land use)
3. Growth and Yield
 - Yield curve and volume table development
 - Identify transitions
4. Identify Unique Spatial Themes
 - FireSmart initiatives
 - Recreation
 - Wildlife

Public Involvement

1. Identify and engage a Facilitator
2. Clarify an appropriate public involvement process that includes:
 - The meeting of most standards and the Planning Manual recommendations.
 - Initiating a public disclosure
 - Aboriginal participation
 - Advisory Group terms of reference
 - Open houses & workshops (before and when nearing completion of the draft plan)
 - Stakeholder meetings and summary notes from the Advisory Group

Text Development

1. Contact all Planning Team and Technical support participants and the advisory committee to explain:
 - Legislation and policy context
 - The writing process
2. Investigate CSA certification requirements and implement a structure for the text that meets CSA requirements and satisfies the requirements of the proposed Forest Management planning manual.
3. Clarify broad goals
 - Identify values of public, their previous inputs and desires
 - Identify department values
 - Review alternatives and choose the preferred future forest with Advisory group input
4. Develop objectives that elucidate the Preferred Future Forest
 - Identify and distribute a format to be followed for the writing of all objectives, targets, processes /tasks and the indicator that will be monitored.
 - Establish an editing protocol (internal team) and external (utilizing private editor)
5. Identify the targets to be employed to meet the objectives and include:
 - Projects existing and new initiatives required
 - Funding required (or lack of funding), source or potential source
 - Existing policies that limit the strategy and may require revision
6. Design and Publication
 - Establish style, format, and complete graphic design.
 - Pre-identification of pictures required and collection of pictures.