

SUSTAINABLE OUTDOOR RECREATION COLLABORATIVE SITUATION ASSESSMENT

Key Findings & Recommendations from Interviews
Conducted by Consensus and Collaboration Program,
California State University, Sacramento

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SACRAMENTO STATE
COLLEGE OF CONTINUING EDUCATION

Consensus and Collaboration Program

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OVERVIEW

“Perhaps the rebuilding of the body and spirit is the greatest service derivable from our forests, for what worth are material things if we lose the character and quality of people that are the soul of America.”

--Arthur Carhart, Forest Service Landscape Architect, 1919

The USDA Forest Service Pacific Southwest Region (Region 5) serves the needs of a diverse constituency by offering wide-ranging recreational and commercial opportunities on the nearly 21 million acres of publicly managed forests and grasslands within California. With California’s population increasing and diversifying, more and more people are seeking opportunities to recreate and enjoy the outdoors. Whether hiking, biking, viewing wildlife and scenery, hunting/fishing, riding horses, exploring cross-country ski or snowmobile routes, camping, climbing, or driving off-highway vehicles, etc., the increased visitation is presenting a variety of challenges. From overcrowding in certain areas, resulting in user conflicts, to unmanaged activities in other areas causing environmental degradation, the challenges faced by the civil servants entrusted with the responsibility of managing these important public resources has become incredibly taxing and expensive.

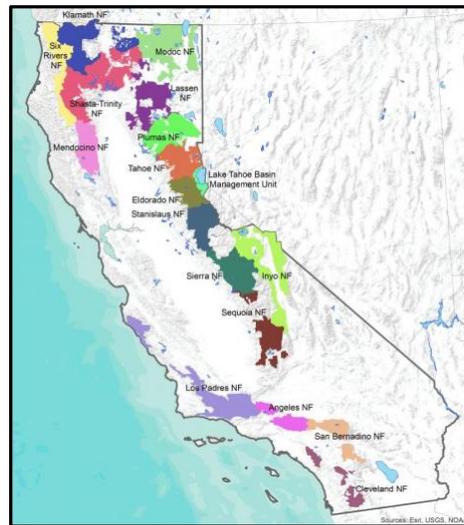


Figure 1: USFS Pacific Southwest Region

With the appreciation that outdoor recreation contributes greatly to the physical, mental, and spiritual health of individuals, bonds family and friends, instills pride in heritage, and provides economic benefits to communities, regions, and the nation, the U.S. Forest Service understands that recreation has become an essential part of our American culture.

In support of these benefits, Region 5 is committed to providing responsible recreation opportunities in a balanced way for the enjoyment of all while ensuring that ecological values are maintained and improved for the benefit of future generations. To this end, with the encouragement of a number of advocacy groups, Region 5 agreed to utilize funds to retain a neutral, third-party facilitation team from the Sacramento State Consensus and Collaboration Program (CCP) to help guide a Sustainable Outdoor Recreation Collaborative (SORC). The collaborative is an effort of willing and committed organizations

and individuals to undertake shared learning, build trust, and develop ideas and suggestions for how all recreationists and interest groups can collaborate and work effectively together to instill a strong sense of community ownership and responsibility for the public lands.

The purpose of the SORC is to gather a diverse group of interested parties who will work together in public workshops, discuss mutual and differing recreation desires and challenges on Forest Service managed lands, and provide input to the Forest Service on recreation related topics that are of importance in upcoming Forest Plan revisions scheduled to start in 2020 and continuing for several years. The SORC process is not being convened by the USFS to review any specific proposed project nor will the Forest Service be bound to any recommendations that may result from the SORC's discussions. However, participants hope that outcomes will inform future forest plan and other recreation-related deliberations and will result in mutually constructive, safe, economically feasible and environmentally sound ways to support diverse recreational uses on publicly managed lands within Region 5.

To begin this process, the CCP facilitation team conducted stakeholder interviews with numerous and diverse recreation and conservation interests. This report shares the findings from these conversations and presents recommendations for how to structure the SORC process.

ASSESSMENT METHODOLOGY

The CCP facilitators worked with Region 5, the Outdoor Alliance, and Winter Wildlands Alliance to identify organizations and individuals representing key stakeholder interests to participate initially in the assessment process. Starting with this list, CCP facilitators conducted interviews representing a range of recreation and conservation-related interests and viewpoints on public lands access and management. As the interview process proceeded, CCP invited additional interview participants to ensure a comprehensive and broad range of interests contributed to CCP's understanding and to be responsive to recurring recommendations from other interviewees. In total, CCP conducted interviews with twenty-four individuals representing twenty-three organizations from early March to late April 2020. The appendix lists participating organizations and individuals.

The interviews were guided by a questionnaire (see Appendix) which covered the following topics relative to recreation within Region 5:

- Identification of the most significant recreation-related issues and opportunities;
- Stakeholders' goals and general concerns regarding recreation and volunteer management and involvement;

- Information and technical data needs to inform SORC’s discussions;
- Historic and current interpersonal and organizational relationships among stakeholders;
- Desires for and challenges of a collaborative process;
- Knowledge of other efforts underway that should be considered; and
- Willingness to participate in collaborative planning.

All interviews were confidential. The facilitators do not attribute specific comments to individuals in this report, but many poignant comments are shown in quotations in the findings. CCP will not share interview data with the Forest Service nor any interest groups. Rather, the CCP facilitation team has summarized and qualitatively evaluated the information gathered through the assessment to identify stakeholder consensus and discord and to develop recommendations related to how best to structure the SORC process.

KEY FINDINGS

The interviews provided a wealth of information and insights into the recreation and conservation-related issues facing the communities within Region 5. The report authors have summarized the findings into the following categories: key goals, issues, and scope of the proposed approach; information and data needs; participating organizations and individuals; and collaborative process protocol.

Key Goals, Issues and Scope of the Proposed Approach

Definition of “Sustainable Outdoor Recreation”

Interviewees shared a range of perspectives on defining “sustainable outdoor recreation.” Some said that “sustainability” is a buzzword that lacks a meaningful, agreed-upon definition and expressed concern that its use therefore is likely to lead to conflict. A few interviewees said that it is a question of the carrying capacity of the land, but that there is no way to measure this so in many ways it is a matter of point of view with no right or wrong perspective.

Other participants shared their succinct definitions or their perspective on elements of sustainability. An overarching sentiment from the discussion focused on the need for a definition that highlights that “sustainable recreation” are the activities that are repeatable over time into the future without degradation to the resources on which said activities occur; if the resources are allowed to be eroded, then the activity is no longer “sustainable”.

The list below summarizes the components of sustainability highlighted by participants:

- Allows for and managed to support long-term use:
 - The capacity of the available facilities impacts the levels of use that can be sustained over time.

- Financial sustainability: funding for long-term maintenance is critical.
- Management and maintenance capacity should be considered; resources that are not properly maintained are not sustainable.
- Provides broad access, with balanced opportunities for all forest user groups to recreate.
- Recreation, both motorized and non-motorized, in appropriate areas, with recreational resources such as trails located within the landscape in such a way that minimizes resource damage.
- Resource protection: recreational uses should not have negative impacts on vulnerable lands, soils, water, and wildlife.
- Policies should respect the need to manage greenhouse gas emissions.
- Sustainable means taking care of what we have. Maintaining trails to provide for safe use. “Maintained” and volunteer cooperating agreements in place.
- Need to create “recreation culture” at forest level. “Tahoe is a good example meanwhile Six Rivers is at other end of spectrum.” “Good stuff is happening by accident, not by design.”
- Sustainable through active management. Will keep on going without detriment to environment or the users over time.
- Important to clearly define the words. Need a definition to help frame dialogue. Sustainability includes two parts: 1) recreation that does not add to the climate and extinction problem, and 2) focused on activities that are for the most part not able to be done on public lands. “Sustain an experience that is not available elsewhere.”
- Need for trails to be designed in a manner that prevents massive maintenance every year.
- “Sustainable” means managed, maintained, and/or mitigated. Actions that actually contribute to sustainability.
- Any recreational activity that can be undertaken without any long-term impacts. Maintenance is part of sustainability.
- Definition in Inyo Forest Management Plan is good example.
- Need better advisement on how to address climate change. Long-term viability of lands to sustain activities. Helping and acknowledging future or recreation outdoors. Being ready for the unknown is part of being sustainable.
- Key to sustainability is dispersing users and reduces strain on system and user conflict. USFS continues to move programs that reduce use. Why aren’t we adding more uses? With increased population and desire, why are we reducing access? Carrying capacity of the lands needs to be better understood. When you exceed capacity, the work to be done to improve trail increases drastically which is counter-productive.
- Need for sustainable policies and facilities that sustain long-term use. Long-term maintenance is not being funded.
- Triple bottom line perspective: social, economic and environmental aspects. Need for broad definition.

Most Significant Recreation-Related Issues

With regard to recreation-related challenges, a recurrent theme among interviewees was the pressure on over-extended USFS staff and their lack of resources and capacity. Participants discussed various challenges related to this issue, including lack of funding and staffing to maintain existing facilities, lack of training for USFS staff about recreation and special uses, and reluctance to dedicate limited staff to necessary planning and regulatory review processes that would allow permittees and volunteers to carry out improvements that would better serve recreation uses and volunteer engagement. Specific related recurring topics included:

- Lack of staffing and funding to maintain existing facilities and trails, many of which are in poor shape.
- Need to focus on cost-sharing agreements to address backlog of needed maintenance work.
- Missed opportunities for improvements and maintenance undertaken by permittees and volunteer groups due to concerns about lengthy NEPA processes and lack of knowledge by USFS staff regarding how to streamline regulatory review. District-level planning processes are very challenging for the public to engage in. A few interviewees expressed the sentiment that more trails are needed to disperse use and that less timely and costly NEPA compliance strategies should be pursued to allow for simple maintenance projects.
- Staff turn-over and rotations: a number of interviewees observed that they have experienced delays and challenges resulting from slowness to fill empty positions and/or the fact that “many USFS employees seem to be always moving from position to position; would like to see staff stay in positions for a longer time in order to build stronger relationships with locals.”
- Lack of training about recreation and special uses due to low prioritization of recreation in the USFS and undervaluing of recreation partners, particularly at the leadership level.
- Inadequate knowledge and understanding of how best to plan for new and quickly evolving forms of recreation such as electric mountain bikes (e-mtbs) and fat bikes that allow for over snow travel.

Other recreation-related challenges highlighted by interviewees included:

- Volunteer management is a huge issue: “the amount of paperwork needed from volunteers is crazy.” Many groups are being told they can’t proceed with needed work until there is additional Forest Service staff and/or “green light” from management to proceed. One interviewee shared that on their local forest, trailhead signs have been created in multiple languages and are ready to be installed, but final approval has not been given.
- Access and services: increasing the demand for use from urban and underprivileged groups and mobility-challenged users. Providing infrastructure to allow families the ability to recreate in an equitable manner is critical. One interviewee asked, “how does California’s increasingly

diversified population recreate now and are the National Forest’s recreation amenities and services appropriate to meet these and future needs?” Staging areas and trailheads need to be improved or created in areas that are seeing high visitation.

- Resource/ecosystem health: forest health, tree loss, habitat degradation, and protecting vulnerable species.
- Challenging experiences in past attempts at collaborative processes: for example, some felt that the Sierra Nevada Framework and development of the Giant Sequoia National Monument both ended without significant progress.
- Lack of understanding of the positive economic impacts of recreation on rural communities.
- Challenge of balancing the many forest uses on the ground in a manner that decreases user conflict while protecting the natural resources.
- Regulatory review and National Environmental Policy Act (NEPA) compliance process is very tiring and overwhelming to broader audience. Numerous recreation advocates observed that the NEPA process heavily favors interests that have paid staff and lawyers.
- Unlawful and inappropriate uses in certain areas are challenging to monitor. Woodcutting, recreational shooting and unmanaged travel across such massive areas is incredibly difficult.
- Access to public lands should be prioritized over trail closures and use reduction. No parking in many locations results in environmental degradation and safety issues and is especially acute during the snow season. A number of interviewees expressed a shared sentiment that it seems that motorized and mechanized users have been villainized and their access has been seriously diminished in many areas. As a result, many recreationists push their use into more sensitive areas.
- Pacific Crest Trail and John Muir Trail have been impacted seriously from overuse and proposed protected trail crossings for mechanized users is problematic.
- Intense recreation use during the summer in the Eastern Sierra is presenting a challenge.

Most Significant Recreation-Related Opportunities

A recurrent theme among interviewees was the recognition that the recently undertaken and forthcoming forest plan revisions and their corresponding environmental impact statements provide timely opportunities to identify, evaluate, and approve forest-by-forest specific recreation-related projects and initiatives. Many interviewees stressed that these planning efforts can create a regulatory environment for different uses so that all visitors can get their needs met in a manner that decreases user conflicts while also protecting natural resources. Many user group representatives expressed an openness to and desire for collaboration to help inform the upcoming forest plan update processes.

Nearly all interviewees shared that they believe volunteer groups can play a larger role in stewarding the public lands. Many emphasized that these user

groups have intimate knowledge of the landscape which could be better utilized by Forest Service staff to identify and rectify problems and to help with education of visitors. One interviewee stated, “A new model of stewardship that leverages volunteers and partners beyond limited roles that focus on activities such as only trail maintenance should be considered.” Additional input concerning the role of volunteers included:

- “What if a group could, for example, support Forest Service planning with GIS-related work?”
- “The neglect of the recreation amenities is real, and we are ready to help if allowed!”
- Development and adoption of new and improved tools and processes to allow for increased volunteer engagement are possible. One example provided by an interviewee was a prototype online volunteer management software program created by a Volunteer Detail position on the Angeles National Forest two years ago, however it apparently has not been put into use.

Additional identified opportunities included:

- Economic development opportunities resulting from well managed public lands recreation, particularly for rural areas, is happening in many communities. A few interviewees suggested that compiling these success stories could help other areas.
- Opportunities for special use permits for private facilities on USFS lands, which encourages facility owners to invest in improvements that benefit the recreating public. One interviewee noted that many access barriers are removed in summer and, thus, there is an opportunity to expand and diversify the user base. One example is that chairlifts at ski area facilities could be utilized in a subsidized way to bring people to previously unvisited places and help create new experiences and foster a stronger environmental ethic.
- Mapping technology and intense “on-the-ground” knowledge of high use areas can be applied to undertake landscape-level planning to determine best locations for much needed amenities, trailheads, and trails. According to some interviewees, this type of planning could identify long-distance routes which are desired by a growing audience of bike-packers, motorized enthusiasts, and equestrians.
- Many interviewees expressed a desire to increase diversity of those undertaking outdoor activities and are eager and willing to contribute to these efforts. As a component of this, a couple of interviewees stated a need for more partnerships between local governments and user groups to promote opportunities for recreation to underserved communities.
- “Stewardship programs for kids need more attention.” A number of interviewees believe that getting kids outside and finding opportunities for younger students to do meaningful work on the public lands will help build a strong environmental ethic and interest in careers in public lands management.

How to Address Issues & Opportunities

The theme of “leveraging partners” emerged from the conversations with interviewees and a number of individuals expressed a desire for guidance from the Forest Service on how they can support sustainable recreation on public lands. In support of this, many interviewees expressed a desire to learn from successful efforts from across the United States.

Additional recommendations for addressing the issues and opportunities included:

- Consider forming “working groups” comprised of local experts to address topics brought up by multiple user groups and to recommend strategies for addressing challenging on-the-ground situations.
- Consider ways to allow for relinquishing authority or delegating responsibility for certain activities (e.g., chain saw classes and use) to allow for more volunteer efforts. Capacity building and training by groups is a huge opportunity.
- “Try to get beyond simply carving up the pie.” Focus upcoming landscape-level management planning efforts in a manner that allows locals to determine which types of activities can be done without degradation to other users.
- Improve access to information and update Forest Service websites to provide information about the resources and funding available for partnership work.
- Focus resources and support at the Forest District level. Increase use of cost-sharing agreements with volunteer groups to allow for more work to be undertaken. Create “hit list” of projects that could be expedited.
- Look for and increase support of opportunities and groups that educate and engage with younger audiences on how to responsibly be outside.
- Capitalize on the hydroelectric relicensing planning process as opportunity for securing support and approval for recreations amenities exists.

Topics to be Avoided

The predominate recommendations from interviewees were to avoid discussions on the current political situation in America and for participants to refrain from proposing projects and efforts that not allowed under current law or Forest Service rules and regulations. Recreation user groups also stressed their desire to refrain from proposals requesting additional wilderness inventory or desires to change what is allowed within Wilderness areas: “stay clear of anything about mechanized travel in wilderness.” Additional thoughts on topics to be avoided included:

- Disrespect toward USFS or any specific stakeholder or user group.
- Topics that don’t advance agreed upon guiding principles of the collaborative effort or the mission of the Forest Service.
- Opinions on ongoing lawsuits are not helpful and should be avoided.
- Snowmobile use in the High Sierra.
- How to effectively undertake law enforcement.

Sequencing of Topics

Overall:

- Focus on key topics and manageable chunks – important to see progress.
- Alternate between more and less challenging issues.
- Do not open with the most challenging topics but do address them while participants still have energy – give participants a chance to ease into the meeting yet make sure that they are not already tired by the time challenging topics come up.
- Provide opportunities for small group work, including:
 - Breakout groups to allow participants to engage only on topics that are relevant to their work; and
 - Consider creating subcommittees or working groups to focus on specific topics.
- Background presentations are important to get participants on the same page.
- The more that we can minimize presentations and get people to mix it up and work together will be helpful.
- Be inclusive with some sort of ground rules for participation. Newcomers should be able to come aboard without slowing down discussions or rebooting effort due to late arrival.

At first meeting of SORC:

- Get some “skin in the game” by beginning with a topic that has broad importance to participants yet is relatively easy to find common ground on and not too sensitive or controversial.
- Start with “low-hanging fruit,” so that people can see progress being made, for example District-level cost-sharing agreements.
- Spend time building rapport: sharing perspectives and getting to know each other.
- “Would like to hear from Region 5 leadership why recreation planning is critical – a concise narrative about the importance of recreation planning is needed.”
- “Need for very clear goal. What is it that we are working towards? What is the problem we are trying to solve? Without these, groups will bring their own agendas, which may not be realistic. Need for clear definition and expectations, including deliverables.”
- Find common priorities for the group’s work – do a prioritization exercise to identify projects that could be moved forward.
- Would like to learn from other groups and start with something easy to get a win and build trust early on.
- Would be great to develop shared clarity on definition of “sustainable recreation”.
- Would like to hear from each group what their intent is. Provide time for introductions from all groups. Let participants address what their key interests are and what they are working on.
- Presentation on what are the pressing needs for maintenance.
- Create clarity on what the planning area for this effort is.

- Would like to see a few action items from first meeting. Are there tasks that each group could take to identify weaknesses and strengths that would prevent future success?
- Creation of manageable cost-share agreement process would be huge.
- Identify achievable metrics and topics that can be undertaken.

Ahead of the first meeting:

- Clarify the SORC's hope for influencing forest plans – will the work be applicable to implementation of already updated plans or only those that have not yet developed their plans?
- Provide invitees a list of participating organizations.

Information and Data Needs

The mediators asked participants about technical information needed to enable productive conversations and what relevant data and materials they had to offer to. Responses and recommendations are provided below.

Desired Information to Inform Discussions:

- Usage patterns, including visitor numbers, type of recreation, and demographic information.
- Maps, including master maps for each forest. Usage patterns from all groups would be helpful.
- Socioeconomic data is always helpful.
- Degrees of impact and enjoyment need to be better understood; better tools for assessing impacts are needed. What does the scientific research show is the impact on the land and species? What is the impact zone by various uses? How can economic impact from tourism be measured? What is the ROI? How do we measure benefits? What are the types of activities and their respective impacts on economy?
- What are the known economic impacts to local communities that foster and encourage recreation?
- Global climate change is the existential crisis of our time. What is the impact from various recreation activities specifically on climate change?
- What are predicted future use patterns?
- Campground use data: how is water being used at campgrounds? How many campgrounds have been shuttered due to lack of funds?
- Are there any records indicating trail conditions? How are trails evaluated?
- Who doesn't have access and why – due to lack of transportation, fees, etc.?
- Extent of maintenance backlog.
- What do current Forest Service District Rangers and Forest Supervisors see as the most pressing needs?
- “Until we know as much about the life opportunities of a kid as we do about the critters, then we are not going to get anywhere.”
- Climbing economic impact survey data is very valuable and exists now.
- Public opinion data detailing how folks think about public lands.

- Need for map of hydro-relicensing projects to know where mitigation money might be available. Quantify hydropower relicensing funding that goes into recreation benefits.
- *Nature's Benefits Fact Sheets* available for each forest and for the region that give a snapshot of recreation and other resources, i.e. water and timber.
- Breakdown of recreation budget and staffing on each National Forest.

Data Features and Considerations:

- Information should be dated so that its relevance can be easily determined and as up to date as possible.
- Information should be peer-reviewed and/or come from reputable research centers.
- Open-source datasets would be helpful.
- Data is valuable, but the hunt for data can be time-consuming and costly, sometimes beyond its benefit.
- Look to tourism industry for trend data, including about geographical and other differences.
- Work with partners outside public lands management agencies, for example academics, to think outside existing boxes.
- USFS analyses may not reflect the best available science and public opinion.
- Site visits may be helpful.

Data/Presentations Available to Share

Many interviewees expressed willingness to share their information, noting that further discussion amongst the SORC participants is needed to determine what information/data may be useful to inform the deliberations. The following specific offers and suggestions were provided:

- National Forest Homeowners has information about historic preservation of buildings on Forest Service lands.
- National Strategy for Sustainable Trail System document would be good to review.
- National River Database is worthwhile. Would be great to see overlay of all user interests. Outdoor Alliance website resource maps are GREAT.
- Access Fund has resources available to the public on its website, including high-level presentations, webinars, and other materials.
- The National Forest Recreation Association can provide presentations, including delegation of work through concessionaire operation of facilities.
- Pacific Crest Trail Association is working on research regarding use and travel patterns of long-distance hikers on the Pacific Crest Trail.
- Sierra Access Coalition has reams of data that is not being used by Forest Service. Snow depth information is good example.
- Trail counters would be interesting. How many people are getting out and where?
- California Landscape Stewardship Network [website](#) resource may be useful.
- Outdoor Alliance maps and data [website](#) provides detailed GIS data.

- Access Fund has high-level presentation and assorted other materials that could be helpful for orientation. Look to website for resources.
- White paper titled, “Sustainable Advantage: Outdoor Recreation and Rural Community Development in California” authored by Aaron Wilcher, California Community College System (916-563-3233 or WilcheA@losrios.edu)

Participating Organizations & Individuals

Ability/Willingness to Participate

Multiple interviewees said their groups would be interested in being part of the SORC, but lack of capacity and resources would make participation in regular in-person meetings challenging. One suggested meeting quarterly, another emphasized holding remote meetings, and a third suggested allowing organizations to stay apprised of SORC’s progress, for example by attending virtual meetings, even if they are unable to participate fully. One interviewee said that their organization needed additional information regarding the group’s scope before determining their level of participation. A few invited individuals were unable to contribute to the interview process and it is unknown whether or not these groups will be able to further participate in the SORC (please see the Appendix for a complete list of who was interviewed and which groups declined to participate).

Additional comments included:

- Some parties believe that environmental/conservation advocates wield too much influence and, as a result, recreation interests are seen as “culprits”. Others express concern about negotiating directly with some interest groups who have relied on litigation to affect public lands planning.
- Many recreation interests feel that they are often accused of not caring for the natural environment when in fact they do, but the actions of a few are outweighing the efforts of responsible recreationists. A few stakeholders suggested that politics influence everything and that these dynamics will significantly affect any planning effort.
- A small number of individuals expressed the opinion that the invited groups will not work together productively and asked why we need more processes and meetings when we already have formal NEPA processes in place for planning.
- “Honest conversation between groups may be possible in this process but I am dubious of what will happen when a formal NEPA effort is launched.”
- An interviewee said that it seems planning is decided by possibility of species presence and not actual species presence.
- One interviewee shared, “I do not have any concerns about the invited groups working together; representation is not a factor, but how the conversation is framed. Need for breadth for legitimacy and perceived legitimacy from outside. Need for Forest Service to create an authentic dialogue between strong collection of interests.”
- “Sense of urgency is needed. We have a short window and need to strike.”

- An interviewee that has been engaged in many public processes stated, “We will know we are being successful when we get sued. Being too good at collaborating will result in some groups not wanting to participate.”

Desired Outcomes

Many interviewees shared their appreciation of the Forest Service for initiating the dialogue on sustainable recreation as it has the potential to improve mutual understanding between recreation and conservation groups and help identify solutions to long-standing and ongoing conflicts. A number of individuals were also looking forward to the opportunity to network with other recreation stakeholders from across California.

Multiple interviewees expressed a need to better understand the scope and potential outcomes of the Collaborative. “Whatever the product is, we should have a better sense of what the intended deliverable is as we get into the effort,” said one interviewee. Many others expressed a need to know how the SORC’s efforts might inform the Forest Service’s actions and if there is any specific structural process that will be followed with anything that comes from the effort.

Numerous interviewees shared their desire for outcomes related to Forest Service decision-making, including:

- Improve understanding of Forest Service decisions that might affect special uses or areas.
- Decisions made based upon best available science, not lobbying power or personality.
- SORC input taken into account in forest plan revision processes.
- Increased clarity and understanding of the process for implementing increases in cost-share agreements at the Forest District level.
- Forest Service taking clear steps toward prioritizing recreation and special uses and working with their partners in recreation and special uses.
- Increased social license for Forest Service to do the “right thing.”
- Increased forest leadership and user group understanding and empathy between stakeholders.
- Workshop on Forest Service considerations and key mandates so recreation community knows what else the Forest Service is occupied with.
- Improvements to volunteer management process and tools, including how to involve smaller groups in volunteer trail improvements.

Additional suggestions included:

- Focus on actionable items that members can work on.
- Focus on problem solving.
- Would like to see some basic guidance on what is sustainable recreation and how do we support the Forest Service going forward?
- Would like to have a network for future discussions. Good group to discuss ideas with is needed.
- No more “word clouds” needed. Hope for on-the-ground, site-specific recommendations and opportunities to build support for forest planning!

- Development of targeted ideas to focus on. Need to focus on how to build sustainability and get more people outside. Need for all participants to practice sustainability. How can we reduce our impact on the planet?
- “More than just a document,” something tangible is wanted. One idea is a study to quantify the economic impact resulting from the lack of funding coming into Forest Service – what is the trade-off between loss of staff versus backlogged maintenance?
- If Region 5 can show that it is possible to get diverse stakeholders together to do good, then it would be good to showcase that this type of work is possible as it is helpful in advocating for appropriations at federal level. This group has the opportunity to set the foundation for how this type of work can be done across the country.
- Broaden partnership with University of California and California State University systems, and other higher education institutions as many campuses are in close vicinity to Forest Service supervisors’ offices.
- Increase diversity of those who participate while solving real on-the-ground problems.
- Engage in all levels of recreation planning.
- Guidance document needs to be created to help forest leadership listen more to those who know resources on the ground.
- Anything related to lowering fuel load takes priority. Make sure not to detract from the effort to clean up forests.
- Playbook or guidebook that could help manage public-private partnerships.
- Resolve conflicts between uses.
- Active conversations about what recreation on public lands is and can be.
- More multi-use trails and recreation amenities, including staging areas and parking, in appropriate locations.

Parties/Interests Recommended for Involvement

Nearly all interviewees stressed the critical need for inclusive, diverse participation, particularly since use patterns differ across different communities within Region 5. Many stressed the need for as many voices at the table as possible, including participation from associations that represent:

- Recreationists in all forms, including, but not limited to:
 - Equestrians (shrinking group, but very engaged).
 - Motorcycle and off-highway vehicle users
 - Mountain bikers
 - Snowmobilers
 - Outfitters and guides, including river outfitters and associations
 - Backcountry skiers
 - Climbers
 - Hikers
 - Boaters
 - Target shooters

- Hunters and anglers (“Hook & Bullet groups”). High schools with trap shooting clubs might be a source of representatives. [Modoc Outdoor Adventures](#) could be a useful resource.
- Conservation and wildlife protection groups, including major environmental organizations as well as more regional or place-based groups.
- Communities located near Forest Service lands
- Ski area associations (state or national)
- Youth camps
- Chamber of Commerce, for example near Tahoe, Shasta Cascade, etc.
- Native American tribal engagement is really important. Recommend starting by looking to tribes who have been involved in regional planning efforts (i.e., Washoe, Maidu Tribes and others).
- Concessionaires need to be considered as they interact with public.
- Physically challenged user groups.
- Consider providing grants to groups who participate to help cover cost of participation.
- State and local government engagement. California Natural Resources Agency has been missing from related dialogues. Local government is important! RCRC staff person would be important to have at the table. Possibly ask Doug Ketter from Butte County to participate.
- Relevant federal land managers.
- Climate scientists would be worthwhile.
- Academics well versed in recreation disturbances, including Nina Roberts from San Francisco State University.
- Representatives of retirees and older populations who tend to be neglected when it comes to planning for public lands.
- Groups that work on the ground are very localized and are not engaged in broader policy interests. How are people who are paid to have an opinion going to be engaged? Will the parameters be set to allow broader participation?

Potential for Meaningful Collaboration

Nearly all interviewees believe that the parties initially invited to participate have the potential to contribute to the dialogue in a meaningful and constructive manner. However, many interviewees stressed the need for all participants to be willing to balance their own needs with other land management needs. Moreover, the sentiment that the dialogue needs people who want to move things forward in a constructive and realistic manner was stated emphatically. Participants observed that many past collaborative efforts have been undermined by groups choosing not to engage in developing solutions together, instead challenging outcomes once a process has concluded.

Multiple participants emphasized that this is a significant undertaking, with associated challenges. The following additional comments provide insight into the challenges SORC will need to overcome in order to ensure a productive exchange of ideas and formulation of broadly supported concepts:

- Conflicting agendas from groups creates tension. Need for empathy from all involved. Need for compromise and concessions in order to move efforts forward.
- Finding a way to leave challenging topics for future refinement if needed.
- “Can’t let the thinking you agree on stop you from talking about what you disagree about.”
- “Such a huge undertaking. Like eating an elephant... where do you start?”
- “Couple of things need to happen: inclusive participation, transparency, reasonable expectations up front. The process is not going to result in decisions easily or quickly and will expose issues that will be difficult to agree upon. Need to be careful to not create expectations that cannot be met.”
- “Need to be mindful of past inhabitants of the lands and acknowledge that many of the most engaged in landscape-level planning come from rather privileged backgrounds and experiences.” Need to be respectful of the past while planning for the future. Impossibly large number of interests that could be invited. May need for multiple tables to be functioning in order to make conversation valuable.
- Build recreation capacity at forest/district level to build energy and effort. Build capacity at local level to avoid challenges from afar.
- Need to recognize facts and stay away from emotions.
- Need for strong sideboards to manage process.
- If the goals and definitions are clearly stated and end goals are articulated, then there is a better chance of success.
- “Least helpful includes people making proclamations that are irrelevant to the topic on the table.”
- “Need to overcome challenge between national advocacy level initiatives and on-the-ground volunteers who don’t always see eye-to-eye.”
- “When people get together in-person, it is more productive. Believes getting everyone in the room is key.”

Parallel or Related Processes

A number of similar efforts across the United States were mentioned by interviewees as worth exploring as well as a smaller number of initiatives convened within Region 5 over the past decade, including the Sierra Cascades Dialogue and the Dinkey Collaborative. A few interviewees expressed interest in integrating SORC’s discussions with existing regional-focused efforts underway within California including the [Eastern Sierra Sustainable Recreation Partnership](#), the [Siskiyou Outdoor Recreation Alliance](#) and the recently initiated CALREC Vision stakeholder engagement effort. According to the interviewees familiar with these efforts, the opportunity for broader collaboration with these groups should be explored as they provide opportunities for broadening and adding to productive conversations. Other related processes identified included:

- Sustainable Trails Initiative in Region 6 is multi-forest, though not regionwide and may provide useful guidance.
- Pisgah National Forest in North Carolina has a process underway right now that is interesting.

- Outdoor Recreation Roundtable is producing relevant information.
- Olympic Peninsula effort is worthwhile.
- California Community College System researchers have completed a study of recreation and were scheduled to present at the California Trails & Greenways Conference, which has been cancelled, but is holding virtual presentations.

Related Lawsuits and Legislative Efforts

Nearly all interviewees acknowledged that litigation has been widely used by numerous organizations to challenge Forest Service decisions and a number of user group representatives expressed concern over the potential for legal challenges to stymie implementation of any or all of SORC’s recommendations. With this said and as reported elsewhere in this report, most interviewees expressed a desire and willingness to engage in dialogue with parties that might concurrently be engaged in legal challenges with one another over proposed projects on public lands. Related lawsuits and legislative efforts mentioned included:

- Pending e-bike lawsuit brought by the Wilderness Society.
- Legislation proposed by the Pacific Crest Trail Association in Region 6.
- Lawsuit against President Trump Administration related to National Monument reduction in Utah brought by Access Fund.
- Access Fund MOU with USFS related to fixed-anchor policy, as well as objection letter related to fixed-anchors in Inyo Forest Plan.
- Multiple forest planning processes and over-snow travel management processes underway, including decisions related to Pacific Crest Trail corridor access that some user groups are concerned about.
- Ongoing discussions from Trump Administration regarding revising NEPA and related environmental quality laws and regulations.
- Sierra Red Fox Sonoran population on Ebbetts Pass is causing access problems. Center for Biological Diversity sued to bring this into ESA coverage.
- CORVA has petition before Department of Agriculture to review travel management rule.

Collaborative Process Protocol

Participants offered a range of perspectives on participating in a collaborative process and provided the following observations and suggestions:

Role of Facilitator

- Strong facilitation will be important to:
 - Ensure that a balance of perspectives are heard;
 - Frame questions succinctly and in a logical manner.
 - Work to bring all relevant parties to the table; and
 - Moderate dialogue to allow for input from all participants.

- Consider assigning seats for in-person meetings so that participants do not cluster with people they have existing relationships with.
- Visual notetaking may be helpful to demonstrate connections between ideas throughout the process.
- Ensure that the effort is documented in a manner that is useful to all parties and, especially, the Forest Service.

Role of USFS Leadership & Staff

- Forest Service leadership must be willing to collaborate with the participating stakeholders.
- Need for relevant Forest Service staff to be at the table and engaging in meaningful ways.
- “Forest Service leadership should support the hopes and dreams of various Americans by structuring this process in a way to surprise the lesser-represented groups and frustrate the usual suspects.”

Use of Consensus

Interviewees supported striving towards consensus but not requiring unanimity in decisions and recommendations, given the range of perspectives and priorities represented. Many interviewees shared thoughts regarding the drawbacks of requiring unanimous consensus and expressed concerns that if consensus is not reached, the group could feel stuck and that pushing for unanimous consensus may take more time than it is worth. Further, some interviewees are concerned that those who disagree with a majority opinion may be seen as “causing trouble” and fear that in striving for full agreement the resulting recommendations may be so “watered down” that no one is happy with the outcome.

Specific relevant comments and suggestions included:

- Provide a structure through which the range and diversity of opinions and perspectives can be captured; the dissenting opinion structure used by the US Supreme Court is one example.
- Participants should be open to the imperfect “give-and-take” of compromise.
- Focus on getting participants on the same page, though not necessarily unanimity in the outcome of a decision.
- “It is so difficult to get groups of people to agree on anything. It may not be worthwhile to pursue consensus considering who is being invited to the process.”
- Process needs to work towards consensus. “Don’t let perfect get in the way of good.”

Communication Preferences

All participants expressed comfort with communication via both email and phone, as well as with remote meeting platforms such as Zoom. A few interviewees said that their organizations would be unable to participate in person and would prefer remote meetings. Many interviewees expressed a desire for field trips to see different examples of what is working well and what is in need of attention. For

some of the user groups without paid staff, midweek, mid-day meetings are problematic as it is hard for their volunteers to take time off work to participate. Lastly, the Outdoor Alliance offered to host a website landing page to house relevant meeting materials and resources to assist the effort.

RECOMMENDATIONS

“The last few decades have shown that dissatisfaction breeds conflict, litigation, and management by default through the courts. Nobody wins, least of all the environment. Our way of dealing with issues in the past through top-down approaches and through conflict and gridlock doesn’t work. We need to find new models for dealing with the most pressing issues we face today.”

Comments by Forest Service Chief Dale Bosworth at the OHV Collaborative Summit in San Diego, California in 2005

Based on the analysis of the interviews, CCP concludes that collaborative planning on the topic of sustainable recreation within Region 5 is desired by a wide range of interested parties and that the SORC has the potential to provide a forum in which productive and useful dialogue can be held. However, due to the long-standing tension between many of the interests and reality of existing Forest Service rules and regulations, the undertaking will be difficult. Moreover, while all parties that contributed to this assessment desire honest and productive engagement, the reality of the current Covid-19 pandemic and resulting financial hardships faced by many are creating significant and growing challenges, many of which are not fully known yet. Additionally, due to the varying and, in some cases, extreme differences in available staffing and resources, ensuring consistent participation across the many different user groups presents challenges.

However, by structuring the collaborative process in a manner that allows for flexibility and opportunities for interested parties to engage with one another and to share input on discussion topics between official meetings, equitable options for engagement can be created. Further, a small planning group or steering committee could be formed to help identify and ensure outreach to appropriate representative spokespeople during the Collaborative’s efforts.

To ensure that the dialogue group sets a strong foundation from which to grow, CCP suggests that a set of “guiding principles” defining the shared interests, goals and values of the SORC members be agreed upon as this will help establish parameters for what is relevant for discussion and any potential recommendations that might be developed. Instead of attempting to develop these principles from scratch, CCP has reviewed both “[A Framework for Sustainable Recreation](#)” issued by the US Forest Service in June, 2010 and a set of principles initially developed at the Conservation and Recreation Summit, held in Grand Teton National Park in 2015, in a conversation between fifteen outdoor recreation enthusiasts,

conservation advocates and public land managers who had convened to explore ways to better protect America’s outdoor heritage*.

After reviewing both documents, CCP recommends the set of principles, originally developed at the Conservation and Recreation Summit and then revised and updated in 2016 by Colorado Parks and Wildlife and then again in 2017 after input was received from seventy people representing an extremely diverse set of interests, be considered by the SORC participants. It is the opinion of the CCP facilitators that these principles encapsulate the tenets of the principles presented in the Forest Service document and, importantly, were crafted and agreed upon by a very diverse array of stakeholder organizations, a number of which were interviewed as part of this report. With this understanding, CCP presents these principles as a starting point for the conversation amongst SORC participants in an attempt to build unity and develop a shared vision towards what the group is working towards.

Additionally, CCP recommends that a simple charter be created and agreed upon by those engaged at the group’s first meeting in order to outline clear expectations for participation, including how the effort will be facilitated and what role Forest Service staff will play in supporting the discussions. Based on input received from interviewees and drawing from other related collaborative undertakings, CCP created a proposed charter to initiate a conversation regarding the SORC’s decision-making procedures, communication protocols, roles and responsibilities of members, technical advisors, and the neutral facilitator(s). Both the proposed guiding principles and draft charter are presented below for consideration at the first SORC meeting.

Lastly, in acknowledgement that many interviewees stressed the need for an agreed upon definition of “sustainable recreation” to guide the SORC’s discussions, CCP recommends that the definition used in the [Inyo National Forest Land Management Plan](#), which is the most recently updated management plan in Region 5, be reviewed at the group’s first meeting. This definition states:

“Sustainable recreation refers to the set of recreation settings and opportunities on the National Forest System that is ecologically, economically and socially sustainable for present and future generations.”

Assuming agreement on a definition of “sustainable recreation,” a set of guiding principles and a charter can be reached by the parties engaged at the first SORC convening, CCP believes that the SORC initiative will create a platform from which to discuss recreation-related topics in a productive manner with the goal of providing useful and actionable ideas for use across Region 5.

* For a more detailed explanation of how these principles were developed and revised, including a list of the specific individuals and organizations that contributed to the development of these principles, please visit the website [here](#).

Proposed Guiding Principles for Advancing Sustainable Outdoor Recreation and Conservation

The set of proposed principles that follow were informed by numerous historic and ongoing efforts on the issue. They aim to guide collaboration among outdoor recreationists, conservationists, and public land managers and serve as a starting point for collective, strategic conversations and actions to protect public lands, waters, and wildlife.

1. **Outdoor recreation and conservation require that a diversity of lands and waters be publicly owned, available for public access, and well-stewarded.** The uniquely American public land heritage is a privilege and a birthright. Stewardship of our public lands – including waters and wildlife – is our responsibility.
2. **Recreation and conservation need each other.** Both are beneficial to local economic well-being, quality of life, and personal health. Outdoor recreation helps people understand the importance of healthy, intact ecosystems, which builds support for their protection and stewardship. Conservation protects the natural resources and wild places upon which outdoor recreation depends. Responsible recreation – which fosters and is informed by a conservation ethic while promoting diverse, inclusive, and next-generation engagement – is essential for future protection and use of our public lands.
3. **The future of our public lands depends on support from all Americans.** Outdoor recreation and conservation must reflect, respect, and value the demographic and cultural diversity of our country in order to engage a coalition of stakeholders broad enough to ensure the health and wellbeing of our public lands. This requires that public lands be inclusive, relevant, and accessible to all, regardless of ability, race, socioeconomic status, gender identity, or sexual orientation, and include the 85% of Americans who live in urban areas as well as the private landowners whose lands provide connectivity and full-landscape solutions.
4. **Outdoor users are responsible for avoiding and minimizing the impacts of their use across the places they recreate and the larger landscape.** All recreation has impact. Ethical outdoor behavior that demonstrates respect for lands, water, and wildlife and that respects the value of connecting all people to the outdoors is critical and must be developed in all users and in future generations.

5. **Proactive, professional planning and management, combined with public education, is necessary to care for the land and provide a diversity of quality recreation opportunities.** Active public engagement in crafting solutions is necessary to ensure solutions are fair and can be effectively implemented. To make better decisions about which activities are best suited for which locations and provide a spectrum of opportunities to serve diverse interests, a broad landscape approach is necessary in order to meet both conservation and recreation needs.
6. **Physical, biological and social science must inform the management of recreation.** Management decisions should be grounded in the best available scientific information to ensure the protection of wild areas and the sustainability of resources while maintaining and enhancing the quality of outdoor recreation experiences.
7. **Stable long-term funding and creative management solutions are essential to protect the environment and support outdoor recreation.** Reliable and consistent funding is essential to protect natural resources and manage outdoor recreational experiences. Funding levels must be proportionate to the economic and public health benefits of outdoor recreation and a healthy environment. Land management agencies need adequate funding from federal, state, and local sources. This must be supplemented by (but not replaced by) new and non-traditional funding from private and non-profit sources.

Proposed Sustainable Outdoor Recreation Collaborative Charter

Purpose of the Charter

This charter explains the charge, structure, planning and decision-making process, and the procedural guidelines for stakeholders who agree to participate in the Sustainable Outdoor Recreation Collaborative (SORC).

Intent of the SORC Effort

Through open and transparent collaboration among a dedicated group of diverse participants, and using the best available data and information, the SORC will make steady progress toward providing advice and recommendations to decision makers concerning the management of recreation and stewardship activities on lands managed by the US Forest Service within the Pacific Southwest region (Region 5). SORC participants understand that the US Forest Service is not bound to implement any of the recommendations SORC provides.

Participation

Membership in SORC is defined as those who are willing to regularly attend meetings and/or contribute between meetings electronically and who agree to participate according to the terms of this charter. Participants will:

- Engage in collaborative problem solving to find solutions that address the range of interests brought to the table. Members must be willing to seek agreements that meet the variety of interests included in the SORC, not just their own.
- Work with their own groups, organizations, and constituencies to understand and articulate their interests, to secure their on-going input and, as appropriate, to build support for final proposals.
- Endeavor in good faith to develop strategies and proposed projects that are satisfactory to all participatory parties.
- Ensure that an integrated approach is taken in formulating strategies by meeting together as needed to assure strong communication and collaboration among contributors.
- Periodically review participation; identify missing interests; and recruit, as needed, new participants to ensure diverse participation in the collaborative.
- Participate actively in meetings. Only through constructive dialogue among diverse stakeholders can SORC achieve its purpose.

Participants will strive to attend all meetings and assigned committees (if any). If unable to attend, participants shall notify the facilitators in advance of the meeting. Recognizing that there are inevitable conflicts in scheduling that may prevent full attendance, the member will seek to be informed of actions taken at meetings at which the participant is absent.

While membership is open, individuals or groups must formally commit to uphold the spirit and guidelines of the charter. New participants must commit to understanding the information being analyzed and previous discussions to participate in the dialogue.

Roles & Responsibilities

SORC Participants: Participants (1) contribute to the discussion on how issues might best be addressed; (2) contribute expertise, data, and information to clarify discussions, eliminate false assumptions, and advance innovation; (3) serve as the liaison to communicate information to and from their organizations and constituencies; and (4) act in a manner that will enhance trust among all partners and interested parties. Participants are responsible for reviewing material in advance and being prepared to engage in substantive discussions during meetings. Participants should attempt to attend every meeting to ensure continuity in discussions and decisions, and to ensure efficient workflow (avoiding repeating conversations, revisiting previous decisions, etc.).

US Forest Service Staff: Resource experts who function as technical advisors to SORC during ongoing discussions of the group and its work groups. Technical advisors participate in meetings to serve as an important resource to the Collaborative on relevant questions and issues.

Facilitators: Provides impartial leadership to the dialogue process and meeting management. Staff are content neutral, which means they will not try to promote a particular outcome for the group, but will advocate for a fair, effective, and credible process. Staff will help SORC stay within scope and follow the terms of the Charter. Specific duties include: (1) helping to formulate meeting objectives and agendas; (2) overseeing the preparation of meeting notes, including points of agreement and disagreement; (3) serving as a confidant for members who wish to express concerns privately, whether about the substance of discussions or the dialogue process. Facilitation staff will also actively suggest methods to accomplish tasks. The facilitators will support capacity building with all SORC members, including interest-based negotiation and aiding the group toward facilitating its own meetings. If a member has a concern about the neutrality or performance of the facilitator, he/she should first speak with the facilitator and then the group. If the concern is unresolved, the member should discuss it with David Ceppos, Managing Senior Mediator, Consensus and Collaboration Program, CSUS.

Steering Committee

To help the facilitators develop agendas and conduct outreach between meetings to ensure robust participation in the SORC, 3-5 individuals representing a cross section of interests are sought to serve as a Steering Committee.

Work Groups

SORC may form work groups to advance tasks necessary to fulfill its purpose. Work groups shall report activities and findings during agenda items placed on a full SORC meeting at the discretion of the Steering Committee. Work groups will follow the same ground rules for interaction as the full SORC.

Decision-Making Process

Decisions made by SORC will be taken as input and may or may not be pursued by the Forest Service.

The decision-making process will be consensus-seeking, however it will also strive to capture the range of perspectives expressed so that the Forest Service may take these into account in considering recommendations made. SORC will approach its deliberations as a collaborative problem-solving body seeking to produce consensus recommendations that address, insofar as possible, the needs and interests of all participants. As necessary, the group will work jointly to educate and build understanding regarding the participants' values and interests related to the issues, while also developing a baseline understanding of essential information and identifying zones of agreement.

Collaborative problem-solving is most successful when parties agree that their major interests have been heard, considered meaningfully, that other participants have made every effort to address their interests in any final recommendations, and that the final recommendations accurately characterize any outstanding differences.

Consensus means the willingness to go along with the decision either in active support of it or in not opposing it. The goal is for support of consensus decisions. Votes will be conducted via thumb-raising, indicating full support (thumb up), can live with it (thumb sideways), or opposition (thumb down). Where participants vote thumb sideways, they will be required to explain their concerns or reservations, and they will be duly noted. When participants vote thumb down, they will be required to explain their vote and provide an alternative, as discussed below. A sideways thumb cannot be interpreted as the intent to defer or delay a decision.

Consensus agreements will be built by those present. Tentative agreements may be made at meetings pending the opportunity for members to consult with their necessary constituencies and to allow others who have participated, but who were not present at the meeting to weigh in. This will be done on a timely basis. The commitment to work for consensus means that members will:

- Participate in the give-and-take of the process in a way that seeks to understand the interests of all,
- Actively generate proposals thought to be workable for all, and
- Work together to reach consensus.

If the group is in general agreement on an issue with the exception of one or two members, the group will ask the dissenting members what it would take for them to

raise their thumb. Dissenting members are responsible for proposing alternatives they believe might achieve group consensus. The meeting facilitator will call for decisions. On some very straightforward, simple matters, the meeting facilitator may simply ask verbally for consensus, and if no objection is raised, a decision will be taken. Decisions of SORC will be recorded in the meeting notes and the opinions of those expressing hesitant (thumbs sideways) or unsupportive (thumbs down) will be included in the summary.

Ground Rules for Interaction

In order to have the most efficient and effective process possible, SORC participants will follow these basic ground rules:

Discussion Ground Rules During Meetings

- Raise hand to be recognized by the Facilitator
- Speak one at a time in meetings as recognized by the Facilitator
- Be concise and stick to the topics on the meeting agenda
- Speak only on one topic per entry (no laundry lists)
- Speak to the whole group when talking
- Avoid side conversations
- Avoid off-topic questions
- Treat each other, the organizations represented on SORC, and the Collaborative itself with respect at all times
- Refrain from interrupting
- Monitor your own participation – everyone should participate, but none should dominate.
- Adhere to the agenda and time schedule with diligence
- Put cell phones on “vibrate” and leave the room if you need to be on your phone
- Be prepared to start on time
- Recognize that everyone’s interests are important
- Avoid repetitiveness
- Agree that it is okay to disagree, and disagree without being disagreeable
- Refrain from hostility, antagonism, sarcasm, and other forms of disrespect
- Leave personal agendas at the door and put personal differences aside in the interest of a successful Collaborative
- Focus on the problem, not the person

Process Ground Rules Throughout the Stakeholder Process

- Adhere to the Charter
- Review information and stay informed
- Work as team players and share all relevant information
- Ask if you do not understand
- Encourage free thinking and offer mutually beneficial solutions
- Encourage candid, frank discussions
- Be honest and tactful; avoid surprises
- Openly express any disagreement or concern with all other Collaborative members
- Actively strive to see the other points of view
- When communicating with the media, Collaborative members will treat each other, the organizations represented in the Collaborative, and the Collaborative itself with respect
- Follow through on commitments
- Share information discussed in the meeting with the organizations and constituents represented and bring back to the Collaborative the opinions and actions of your constituencies
- Communicate the requirements of this charter with the organizations you represent to minimize the possibility of actions contrary to the charter
- Commit to issues in which you have an interest
- Support and actively engage in the Collaboratives' decision process

Speaking to the Media

Collaborative participants are free to speak with the media. When speaking to the media, participants must make clear that they are representing themselves and not the SORC at-large. If the Collaborative member feels uncomfortable speaking with the media, they may refer the media to the facilitators.

Compliance with the Federal Advisory Committee Act

The Federal Advisory Committee Act ensures that advice by various advisory committees formed over the years is objective and accessible to the public. To that end, the Forest Service will publicly notice SORC meetings. Additionally, all meetings will be open to the public and participation is encouraged by anyone who agrees to abide by the terms of this Charter. Furthermore, SORC is not being convened to advise on any specific proposed project or development nor is the agenda being set by the Forest Service.

APPENDIX

Interviewees

- Access Fund: Katie Goodwin, Policy Analyst & California Regional Director
- American Whitewater: Theresa Simsiman, California Stewardship Director
- Backcountry Horseman: Bob Magee, Board Member
- California Mountain Bike Coalition: Steve Messer, Board Member and president of Concerned Off-Road Bicyclists Association (CORBA)
- California Off-Road Vehicle Association (CORVA): Amy Granat, President
- California Outdoor Engagement Coalition: Jenny Mulholland-Beahrs, Director
- California Ski Industry Association (CSIA): Mike Reitzell, Executive Director
- California Wilderness Coalition: Ryan Henson, Senior Policy Director
- CSU Chico (Latinas in Action): Emilyn Sheffield, Professor
- International Mountain Bicycling Association (IMBA): Anthony Duncan
- National Forest Homeowners: Sharon Leach, Executive Director; Alan Pirie, Board Member
- National Forest Recreation Association: Marilyn Reese, Executive Director
- Outdoor Alliance: Katie Hawkins, California Organizer
- Pacific Crest Trail Association (PCTA): Jennifer Tripp, Director of Trail Operations
- Post Wildfire OHV Recovery Alliance: Don Amador, President
- Rural County Representatives of California (RCRC): Stacy Corless, Vice Chair / Mono County Supervisor
- Sierra Access Coalition: Kyle Felker
- Sierra Nevada Conservancy: Bob Kingman, Program Coordinator
- Sierra Snowmobile Foundation: Kevin Bazar
- Stewards of the Sequoia: Chris Horgan, President
- The Wilderness Society: Matt Dietz, Lead Ecologist
- Trout Unlimited: Jessica Strickland, California Inland Trout Program Director
- Winter Wildlands Alliance: David Page, Advocacy Director

Note: the following were invited to participate, but were unable to contribute:

- American Hiking Society
- CalGuns Shooting Sports Association
- California State Parks
- Friends of the River
- High Fives Foundation
- Indigenous Women Hike
- Latino Outdoors
- Outdoor Afro
- Outdoor Asian
- The Sierra Club
- Youth Outside

Assessment Interview Questions

Participating Organizations & Individuals

- 1) With your understanding of the SRC's purpose, who should be at the table and involved in this collaborative in order to have meaningful discussions about sustainable recreation on US Forest Service managed lands?
- 2) Do you feel that the parties you identified above can participate in a constructive way in the proposed SRC discussions? If not, why not and do you have suggestions on how to balance the need to include them, with any challenges that their participation might pose?
- 3) What level of involvement would your group like to have in this process?

Key Goals, Issues and Scope of the Proposed Approach

- 4) In the context of outdoor recreation on National Forest lands, how do you define "sustainable recreation"?
- 5) What is your organization's role regarding sustainable recreation within California and in particular US Forest Service managed lands?
- 6) What are the most significant recreation issues and opportunities on Forest Service managed lands?
 - a. What suggestions do you have to address these issues and opportunities?
 - b. What information or other resources are needed to address these issues and opportunities?
 - c. How should SORC approach these issues and opportunities?
- 7) Do you have any specific desired outcomes from the SORC? Are there any potential challenges associated with SORC's work? If so, what are they and what should everyone participating in the SORC and the support staff do to be prepared for these challenges?
- 8) Do you have any input on the sequence of topics SORC should address? For instance, should the group discuss easier or more challenging topics first?
- 9) Are there any topics that should be off the table for a collaboration like the SORC?

Collaborative Process Protocol

- 10) Assuming you are familiar with collaborative processes, what have you found the most helpful and useful, what has been least helpful?
- 11) Do you think the process should strive towards developing unanimous (i.e. consensus) recommendations regarding the topics under discussion? If so, how do you recommend "consensus" be defined?
- 12) Do you have any recommendations on how the first in-person workshop should be conducted?
- 13) What outcomes would make your organization's involvement worthwhile?

Information and Data Needs

- 14) What information should be available to all members to help everyone accomplish the SORC's purpose? Is that information presently available? Are there data gaps and, if so, what are they?
- 15) Are there particular sources of data and/or analysis that you regard as more trustworthy than others?
- 16) What is the best way for the group to obtain technical data and analysis that would be considered generally reliable by all SORC participants?
- 17) Do you or your organization have background information / educational presentations on relevant topics that may help inform the SORC's discussions? If so, are you willing to share these resources?

Parallel or Related Processes

- 18) Are there any lawsuits, proposed legislation, studies, negotiations or other recent or pending events which could affect this process and the ability or willingness of its participants to proceed with the effort?
- 19) Are you aware of any other similar efforts anywhere within the United States or internationally that would be useful to review and share with the SORC?

Parallel Communication Preferences

- 20) Communication between facilitators and SORC members will be needed on a regular basis. What are your preferred means of communication (i.e., email, phone, chat application such as Slack, etc.)?
- 21) What is your comfort level with virtual meeting platforms such as GoToMeeting?

Other

- 22) Are you planning to attend the April 1st meeting? If so, will you participate in person or remotely?
- 23) Please share any additional thoughts you may have regarding this effort.

Consensus and Collaboration Program

The Consensus and Collaboration Program (CCP) is a unit of California State University, Sacramento. The mission of CCP is to build the capacity of public agencies, stakeholder groups, and the public to use collaborative strategies to improve policy outcomes. CCP has 40 mediators and facilitators working throughout the State of California on some of its most vexing policy dilemmas. CCP staff that conducted the assessment and produced this report include Austin McInerny and Julia Van Horn whose biographies are below.

Austin McInerny has worked as a mediator and facilitator on a number of challenging natural resource management projects over the past dozen years. His relevant experience includes facilitation and strategic planning for off-highway vehicle route designation efforts on many national forests within California. Mr. McInerny has conducted assessments for the South Bay Salt Pond Restoration Project (the largest wetland restoration effort to be undertaken on the West Coast), the Upper Klamath Basin Working Group Restoration Planning Process, Desert Tortoise Recovery Planning Situation Assessment, and the Santa Rosa and San Jacinto Mountains National Monument Management Plan. Mr. McInerny received a Masters in Regional Planning from Cornell University in 1997; is certified by the U.S. Institute for Environmental Conflict Resolution as an Environmental Dispute Resolution and Consensus Building Professional; and has published and lectured on collaborative planning methods.

Julia Van Horn is an associate facilitator and has been with CCP for two years. She supports planning and facilitation of stakeholder engagement processes related to natural resources management, supporting local efforts such as development of Groundwater Sustainability Plans as well as state-level efforts such as integrating tribal perspectives into the Office of Environmental Health Hazard Assessment's *Indicators of Climate Change in California* report. She has worked with clients such as the California Natural Resources Agency, Department of Water Resources, local Groundwater Sustainability Agencies, Los Angeles Department of Water and Power, integrated regional water management advisory committees, South Bay Salt Pond Restoration Project, Pest Management Advisory Committee, and others. Her background also includes community mediation, cooperative development, and social science research.