

## Executive Summary

The Oregon Department of Forestry (ODF), established in 1911, manages approximately 600,000 acres of state forestlands in Northwest Oregon that includes the Clatsop, Tillamook, and Santiam State Forests, and 37,700 acres of other forestlands located in three counties.

Until the Board of Forestry adopted the *Northwest Oregon State Forests Management Plan* (FMP) in 2001, no comprehensive, overarching plan was in place to assist the agency in managing these forests for multiple resource use. The FMP currently provides policy direction and guidance for the Northwest State Forests with a multi-resource approach. The Tillamook Recreation Management Plan (RMP) was the Agency's first recreation plan, prepared in 1993. Subsequent plans were prepared in 2000 and 2001 for each of the State Forests and the West Oregon District forestlands as elements of the Forest Management Plan.

In 2006, ODF commissioned Strategic Resource Systems to conduct a second-party assessment of the effectiveness of its two forest management plans, resulting in the *Forest Management Assessment Report*. In January 2007, ODF commissioned David Reed & Associates (DRA) to conduct a second-party assessment of the State Forest recreation program patterned after the Forest Management Plan assessment.

ODF staff requested this second-party assessment to obtain an independent review of current effectiveness and implementation of the four Northwest Oregon recreation management plans, with the goal of continued improvement and enhancement of the recreation program.

The assessment team initially examined the recreation plans, based on their structure and relevance. Based on criteria developed by both the DRA assessment team and ODF staff, field visits were then made to assess the recreation program and management practices. The assessment process concluded with final reviews of the plans to determine their efficacy. Conclusions and general findings from the assessment are summarized here, with more detailed conclusions and findings at the end of the report.

## **Conclusions**

After 15 years of continual growth without the benefit of a strategic and long-range planning framework, the Oregon State Forests recreation program is at a critical juncture. In large part, the program has evolved in response to recreational demands without duplicating other recreational opportunities in the region as directed by the Forest Management Plan.

The recreation program has accomplished much in its short tenure: rehabilitating recreation sites and trails, striving to minimize user conflicts and adverse impacts to forest resources, and building strong relationships with some user groups.

However, with the magnitude, diversity, and complexity of recreational demands placed on the Agency, a more strategic and coordinated approach is imperative. Such an approach will necessitate incorporating more professional management practices and expertise if the recreation program is to achieve the stewardship ethic and sustainability goals of the agency's overall mission: ". . . protecting, managing, and promoting stewardship of Oregon's forests to enhance environmental, economic, and community sustainability."

Based on findings from this second-party assessment, the recreation program currently exhibits multiple indicators of programmatic stress. Simply stated, a lack of strategic direction, outdated recreation plans, and inadequate management systems and practices are preventing the program from meeting requirements for a growing, complex delivery system.

As a result, the agency seldom sets limits on recreational use. Additionally, increasing tension is apparent with some user groups when limits of use are proposed. Some recreation uses are also causing impacts to forest resources. These problems are exacerbated by inadequate staffing levels and training, continued use of Limited Duration staff over several years, and an organizational structure that does not provide focused leadership and support for recreation management.

As staff implements recreation management plans for each of the State Forests, it is apparent that these plans have reached the end of their useful life. In particular, the plans lack clear policy direction and a framework for resolving a large number of critical management issues. Some plan directives could even have potentially negative impacts on the program. For example, without updated policy direction and standards, several prescribed recreation uses may not be consistent with the Agency's mission of sustainability for State Forest landscape settings.

On its present course, the recreation program will be unable to respond in an organized and orchestrated fashion to an increasing magnitude and diversity of recreational use. More detailed conclusions are included in the Field Assessment section of this report.

### **General Findings**

As previously noted, State Forest recreation management plans and staff have been in place for a relatively short period of time. Given the long history of unregulated recreation use on State Forests, major accomplishments have been made to establish a strong recreation program within a working forest. Recreation staff is committed to ODF policy mandates including the *Greatest Permanent Value* rule, and staff works positively to achieve integrated forest management goals.

The general findings are summarized as follows:

- Generally, recreation facilities and infrastructure are functional, accessible, well maintained, and in good repair. They are constructed of durable materials and are attractive and well designed. Graffiti is removed immediately and litter removal is a high priority.
- Priorities are placed on site rehabilitation and managing recreation use to protect forest resources. Professional planning and design contractors are providing design development expertise and alternatives for upgrading recreation sites and facilities. Activity zoning has been implemented to organize and manage both motorized and non-motorized trail systems. Trail planning continues to be refined with the assistance of GIS mapping.
- Staff works with recreation advisory committees to involve users in implementing recreation management plans. Staff has also executed formal use agreements with organized groups and clubs, notably motorized recreation users, the Oregon Equestrian Trail organization, and recently free-ride mountain bike clubs.
- The strength of the recreation program is its staff. Staff members are motivated, take great pride in their work, and are creative and resourceful. They are actively engaged with user groups, and they present a positive attitude with both the recreating public and ODF colleagues in other disciplines, even when challenged by the complexity of their responsibilities.
- Recreation staff is using the recreation plans to guide their management activities and programs, especially when striving to meet objectives and actions prescribed in the action plans. Because the plans are outdated, lack strategic direction, and no policy framework exists for achieving a "Desired Future Condition"<sup>1</sup>, staff is often left with little guidance on how to interpret and implement specific elements of the plans.

- The recreation program has grown in complexity and diversity to the point that management structure and capabilities are inadequate. The RMPs are not able to provide policy direction for implementing a recreation program that has the capability of responding to growing demands.
- The current recreation program is not able to achieve sustainability goals of the Agency,
- including protection of forest resources and habitats. Moreover, as currently funded and
- structured, the program will not be effective in providing recreation opportunities on State Forests into the future. ODF is attempting to do too much with too little, without a clearly defined role and purpose, and without essential management systems and uniform practices in place that are required to provide safe, high quality recreation experiences across all forest districts.

These specific findings are critical to the future of the recreation program:

**Accomplishments.** Major progress has been made to rehabilitate, upgrade, and professionally manage the forest recreation system in a relatively short period of time. Recreation staff has also created strong partnerships with a number of user groups to facilitate the design, construction, and maintenance of recreation facilities on state forestlands.

**Recreation Plans.** Recreation management plans are outdated and lack strategic policy direction or a clear definition of a “Desired Future Condition” to effectively guide the recreation program. Critical management issues are not addressed, and some action plan prescriptions could have potentially negative consequences if implemented.

**Current Recreation System.** The current recreation delivery system is fragmented, unorganized, and inefficient to maintain due to a lack of strategic direction, formal recreation policies, and critical management practices. Many current management practices are inconsistent throughout the program.

**Management Structure.** The current management structure is not adequate to provide leadership and support for a growing, more complex, and diverse recreation program. Staffing levels are not adequate and Limited Duration positions fail to provide the continuity required to manage such a dynamic system.

**Risk Management.** No risk management program exists specifically for managing recreation. Given increased use and the trend to accommodate higher risk activities such as free-ride mountain biking and motorized recreation with more powerful and higher speed vehicles, risk exposure is high.

**Business Approach.** An overall business approach to recreation management is lacking. Critical information systems and procedures are not in place such as fiscal accountability and impact analysis, benefit/cost analysis, a formal monitoring and research program, and trend analysis.

<sup>1</sup> A *Desired Future Condition* establishes a preferred role and mission for the managing agency including recreation settings, recreation uses, and management strategies that meet specific recreation goals and mandates of the Forest Management Plan.

**Maintenance and Operations.** Maintenance and operations funding is inadequate, even though funds appear to be readily available for continued recreation facility development. There are indications of stress placed on staff due to increasing and more diverse recreation use, as well as limited capacity to absorb and maintain new and upgraded facilities.

**Suitability.** Historical use patterns and user demands tend to drive recreation management more than suitability assessments that provide a sound ecological framework for planning, locating, and managing recreation facilities and infrastructure.

**Motorized Recreation/Competitive Events.** Motorized recreation use and organized competitive events are creating ecological, operational, and staff impacts. In some forest locations, there is direct sediment delivery to streams caused by OHV use.

**Organized OHV Groups.** Based on staff comments, email correspondence between staff and 4WD groups, and the staff report "Motorized Event Management on the Tillamook State Forest," organized groups tend to place intense demands on recreation staff. This problem is exacerbated by a lack of strategic planning and inadequate management policies and practices to help guide decisions.

**Limits of Acceptable Change.** There is no consistent and universal approach to establish desired tolerance levels (Limits of Acceptable Change<sup>2</sup>) in order to establish minimum thresholds for specific recreation activities, conduct suitability analyses, and achieve forest sustainability objectives.

**Resource Damage.** Resource damage from recreation use was observed on all State Forests, and in varying degrees. This damage was caused by both dispersed and developed recreation activities. Due largely to a lack of staff capacity and consistent standards and guidelines, OHV recreation use is creating the most acute damage to forest resources.

**Integrated Forest Management.** Recreation is not well integrated into forest management and transportation planning. This includes both short-term forest operations planning such as timber sales, and long-term planning to achieve interdisciplinary goals of the Forest Management Plan.

**Uniqueness of State Forests.** Each of the State Forests varies ecologically, in land ownership size and patterns, landscape characteristics, and terrain. While consistent and universal recreation policies and strategic direction are important, flexibility must be maintained to develop programs unique to these special and discrete qualities.

**Public Image.** ODF does not communicate a clear image to the general public in terms of its recreation mission, role, management goals, opportunities, rules and regulations. Nor does the Agency provide adequate information about "working forests" as the context for managing Oregon's State Forests.

<sup>2</sup>*Limits of Acceptable Change* is a recreation management concept that is considered more useful than establishing a preferred "carrying capacity" for recreation settings. Rather than setting thresholds for limiting number of users, LAC acknowledges that recreation use will change the biophysical landscape, and limits are established on how much change will be allowed to occur, and where it will occur. LAC prescribes management actions required to maintain acceptable change based on sustainability and resiliency of the resource.