

# Social and Economic Monitoring for the Lakeview Stewardship Collaborative Forest Landscape Restoration Project

Fiscal Years 2014 and 2015

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The Omnibus Public Land Management Act of 2009 included the establishment of the Collaborative Forest Landscape Restoration (CFLR) Program to promote collaborative, science-based ecosystem restoration and benefit local rural economies. The Lakeview Stewardship Collaborative Forest Landscape Restoration Project is one of 23 projects in the U.S. and was awarded funding by the Forest Service in 2012. The project encompasses 662,289 acres on the Fremont-Winema National Forest and is designed to increase restoration activities to both improve forest ecological health and contribute to the social and economic well-being of local communities. To accomplish these objectives, a variety of restoration activities such as forest thinning, prescribed fire, road decommissioning, riparian restoration, and wildlife habitat enhancement may be implemented. Together, the Fremont-Winema National Forest and the Lakeview Stewardship Group work collaboratively to design, implement, and monitor the Lakeview Stewardship Project and its activities.

Monitoring of project outcomes is a vital and required component of CFLR projects. Accomplishment data is collected annually for projects through a Forest Service standardized reporting framework. Collaborative groups associated with CFLR projects are also required to develop individual multiparty monitoring plans for their projects. The Lakeview Stewardship Group collaborated with stakeholders to develop monitoring questions and methods that assess the ecological, social, and economic effects of the Lakeview Stewardship Project. In 2015, the first working paper on the social and economic components of the multiparty monitoring program described baseline conditions in the Lakeview and Paisley ranger districts from 2007 to 2011 and CFLR accomplishments for fiscal years 2012 and 2013.<sup>1</sup> This second report examines the social and economic elements of the multiparty monitoring program for fiscal years 2014 and 2015, and highlights some of the project's accomplishments from its inception as well as changes in the social and economic conditions during this time period. Additional reports for the following years are forthcoming.

## The Lakeview Stewardship Group

The Lakeview Stewardship Group was formed in 1998 to collaborate on restoration projects on and support reauthorization of the Lakeview Federal Stewardship Unit in the Fremont-Winema National Forest. The Lakeview Stewardship Group includes members from the local community, nonprofits and non-governmental organizations, stakeholders on the Fremont-Winema National Forest, and other partners. In 2014, the Forest Service recog-

nized the Lakeview Stewardship Group for their outstanding forest restoration accomplishments by awarding them the “2014 Chief’s Meeting America’s Needs Award.” This prestigious award honored the long-term commitment of the Lakeview Stewardship Group and its members to incorporating ecological restoration and community values in land management goals.



Members of the Lakeview Stewardship Group and collaborators in the field.

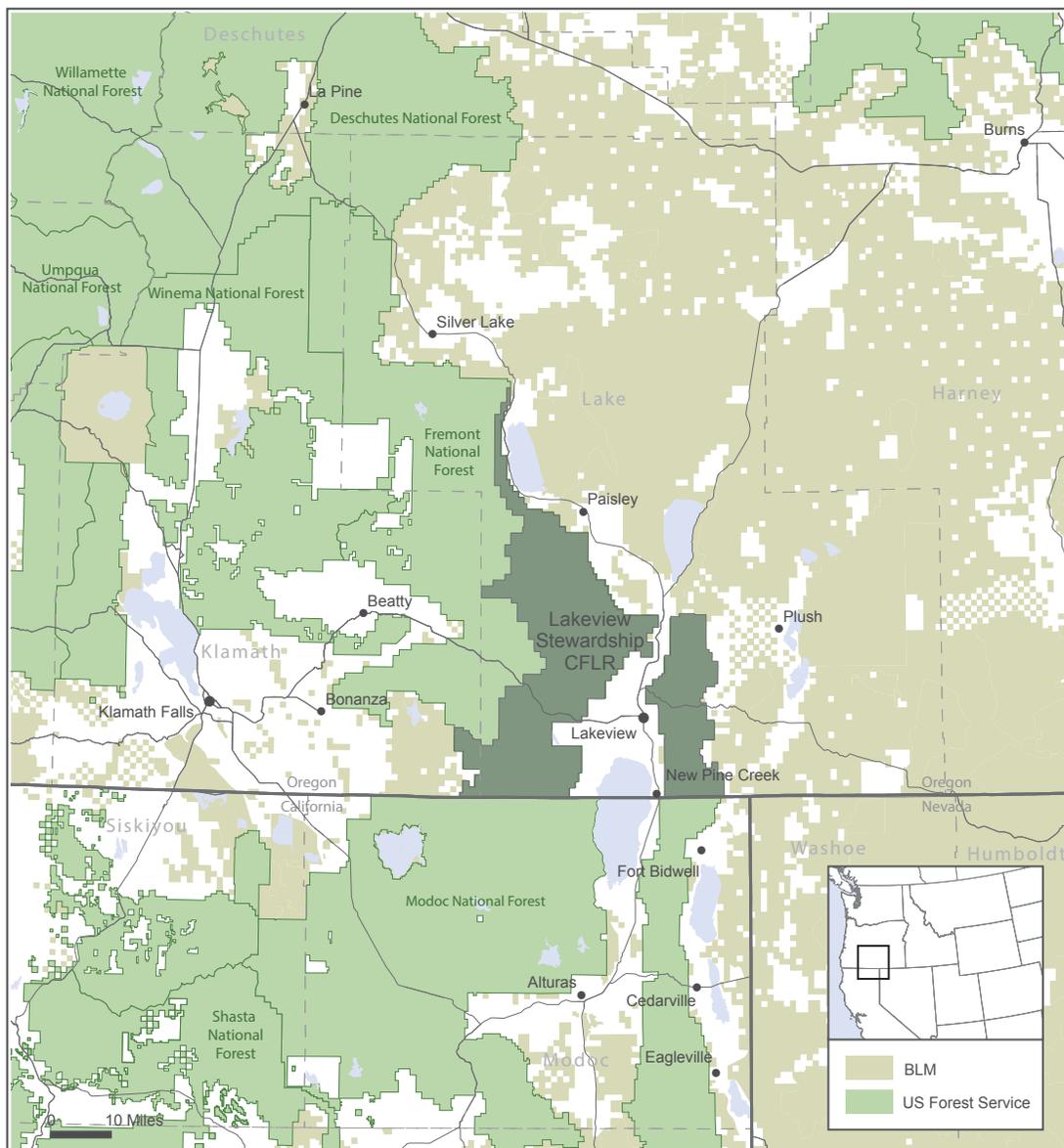
Lakeview Stewardship Group members and collaborators include: Bureau of Land Management, Concerned Friends of the Fremont-Winema, Defenders of Wildlife, Energy Trust of Oregon, Fremont-Winema National Forest, Klamath Community College Lake County, Lake County Chamber of Commerce, Lake County Interagency Office, Lake County Libraries, Lake County Municipal Government, Lake County School District #7, Lake County Renewable Energy Working Group, Lake County Resources Initiative, Lakeview Community Partnership, Lakeview High School, Lakeview Ranger District, National Renewable Energy Laboratory, Obsidian Renewals LLC, Oregon Business Development Department, Oregon Department of Economic and Community Development, Oregon Institute of Technology, Oregon State University Extension Service, Oregon Wild, Pacific Power, Paisley Ranger District, PLAYA, Red Rock Biofuels, South Central Oregon Economic Development District, Sustainable Northwest, The Collins Companies, The Nature Conservancy, Town of Lakeview, US Forest Service, Wallowa Resources, The Wilderness Society, and local citizens.

## Lakeview Stewardship CFLR and monitoring

In 2011, the Lakeview Stewardship Group and the Forest Service applied for the Lakeview Stewardship CFLR (see Figure 1, below) project to promote “(a) healthy, diverse, and resilient forest ecosystem(s) that can accommodate human and natural disturbances (and create) opportunities for people to realize their material, spiritual, and recreational values and relationships with the for-

est.”<sup>2</sup> The Lakeview Stewardship CFLR Project was awarded in 2012, and a Science Team was formed to develop the biophysical, social, and economic components of the required multiparty monitoring plan. This subgroup worked collaboratively to prioritize monitoring goals and create the final monitoring plan. In 2013, the Lakeview Collaborative Forest Landscape Restoration (CFLR) Project

**Figure 1 Lakeview Stewardship CFLR Project**



Monitoring Plan<sup>3</sup> was approved by the full Lakeview Stewardship Group. The goal of the Lakeview CFLR Monitoring Plan is to “outline a monitoring strategy for this landscape for the next 15 years while building on existing and ongoing restoration efforts (p.3).”

Project monitoring provides information on project outcomes to allow for future changes if ongoing goals are not achieved. The purpose of this working paper is to provide an update on the social and economic impacts of Lakeview Stewardship CFLR projects. The collaborative group and the Forest Service can use this information to help determine whether project objectives are being met or if changes need to be made to better meet forest restoration and social-economic goals. Four social and economic monitoring questions were included in the monitoring plan (see Table 1, below), and both the previous report and this second report address and track indicators for these questions. The results section of this working paper is organized to address each of these questions.

## Methods

This multiparty monitoring report attempts to assess how Lakeview Stewardship CFLR activities are influencing social and economic conditions in Lake County, Oregon. We review the local social and economic context in Lake County and provide an update on the social and economic impacts of the Lakeview Stewardship CFLR project for FY 2014 and 2015 based on established monitoring questions. Methods used in this report differed from those outlined in the previous report for some monitoring questions. Where it is feasible (where methods are the same or similar for a question), impacts are presented with and compared to those from previous years of the project.

A summary of our approach is included for each monitoring question. Data sources used in analyses and tables are included in the approach sections and below each table or figure as appropriate.

**Table 1 Social and economic monitoring questions and methods for the Lakeview Stewardship CFLR Project multiparty monitoring plan**

Questions	Indicators
What are the overall economic impacts of the CFLR projects?	Job and labor income creation and retention; direct/indirect/induced effects.
How much and what kinds of CFLR work are captured locally?	Project dollars (timber sales, contracts, agreements, etc.) captured by local businesses; types of work captured and not captured. Jobs and income associated with local companies. The importance of CFLR in the work of local businesses.
What are the costs, local capture, and treatment outcomes of different project implementation mechanisms?	Type of work completed through different implementation mechanisms; number of acres treated; amount of stewardship receipts reinvested in restoration; local capture of work implemented with different mechanisms. Qualitative responses from Forest Service about the costs and benefits of different mechanisms and why they were used. Qualitative responses from contractors that are satisfied with how CFLR projects are implemented.
What are the total and matching funds in CFLR?	Use of direct CFLR funds; matching funds provided by the agency; contributed funds by partner organizations; leveraged funds.



## Social and economic context of the Lake County area

The monitoring plan and previous monitoring report included the annual reporting of the social and economic conditions of Lake County, and this report includes these characteristics updated for the relevant report years. Although it is widely understood that the Lakeview Stewardship CFLR project on its own cannot significantly change these social and economic conditions, the information offers useful context for understanding these conditions in the project area, and for improving our understanding of CFLR social and economic outcomes.

Social and economic conditions in Lake County did not change notably during the monitoring period. Lake County unemployment, median age, household income, and poverty levels continue to differ from state-wide levels (see Table 2, below). Lake County residents are older, household income is lower, there is higher unemployment, and more of the population is living in poverty than the statewide average. However, the unemployment rate, percent of students eligible for free or re-

duced lunch, and the percent of the county population living in poverty have decreased compared to the previous report. These decreases likely represent broader shifts in the economy, both in Lake County and beyond, and should not be interpreted as resulting from the CFLR project. The median income of Lake County residents is still considerably lower than the state average, nearly \$19,000 lower. The school dropout rate remains lower than the statewide average, as does the share of students eligible for free or reduced lunch (2014-2015 school year). These conditions have not changed significantly from those described in the previous working paper, and are similar to other less populated rural counties in Eastern Oregon.

The top employment sectors in Lake County are nearly identical to those reported in the previous working paper and include: government, wood products manufacturing, and retail trade (see Table 3 and Figure 2, page 7). Local, state, and federal government agencies account for 42% of employment in the county, and this contrasts sharply

**Table 2 Comparison of key social and economic characteristics in Lake County**

Characteristics	Lake County (current report)	Lake County (previous report)	Oregon state
Population	7829 (2015)	7830 (2013)	4,025,000 (2015)
Median age	48.3 (2011-2015)	46.8 (2007-2011)	39.1 (2011-2015)
Dropout rate – percent of students	2.71% (2015/2016)	2.3% (2012/2013)	3.93% (2015/2016)
Percent of students eligible for free and reduced lunch	45% (2014/2015)	51.8% (2013/2014)	49% (2014/2015)
Median household income	\$32,369 (2015)	\$36,583 (August 2014)	\$51,243 (2011-2015)
Unemployment rate	7.2% (November 2015)	9.5% (August 2014)	5.7% (November 2015)
Percent of population in poverty	12.5% (2011-2015)	18.7% (2007-2011)	11.2% (2011-2015)
Number of Families receiving SNAP benefits	740 (2015)	854 (2013)	293,939 (2015)

with the statewide figure of 16%. Lake County employment in wood products manufacturing, animal production, and crop rotation is also much higher than the statewide average. These employment figures are nearly identical to those reported in the previous working paper, and remain similar to other rural counties across Oregon. Lake County continues to see greater reliance on employment in the government, wood products manufactur-

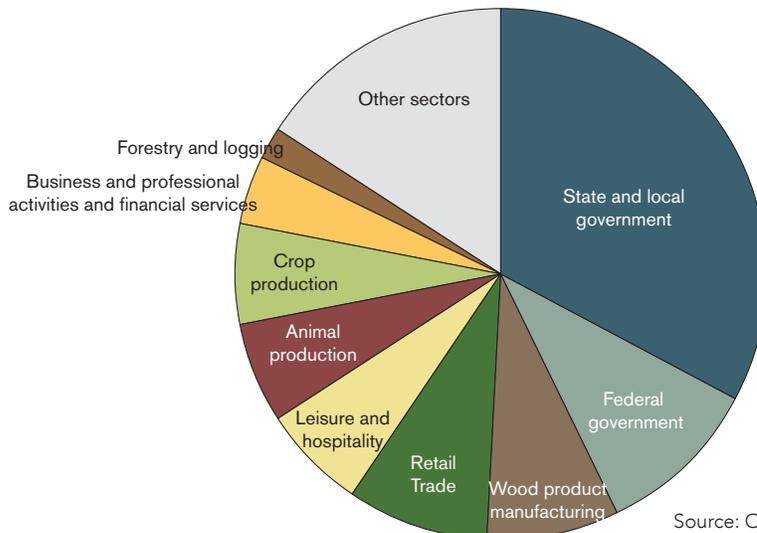
ing, and animal and crop production sectors, and lower reliance on employment in the financial and professional service sectors compared to the state as a whole. However, the Lake County employment figures for the forestry and logging sector vary due to differences in data sources. Both Table 3 and Figure 2 include data solely from the Oregon Employment Department.

**Table 3 Top employment sectors in Lake County, 2013-2014**

Sector	Sector employment in Lake County, 2013 (previous report)	Sector employment in Lake County, 2015 (change from '13)	Percent of Lake County employment, 2015	Percent of Oregon state employment, 2015
State and local Government	738	801 (+63)	32.8%	14.0%
Federal government	242	250 (+8)	10.2%	1.6%
Wood product manufacturing	211	198 (-13)	8.1%	1.3%
Retail trade	204	210 (+6)	8.6%	11.3%
Leisure and hospitality	164	154 (-10)	6.3%	10.7%
Animal production	140	147 (+7)	6.0%	.2%
Crop production	134	148 (+14)	6.1%	1.5%
Business and professional services and financial activities	92	104 (+12)	4.3%	17.3%
Forestry and logging	< 52	<2% (+/- NA)	<2%	0.4%

Source: Oregon Employment Department

**Figure 2 Employment in key economic sectors in Lake County, 2015**



Source: Oregon Employment Department

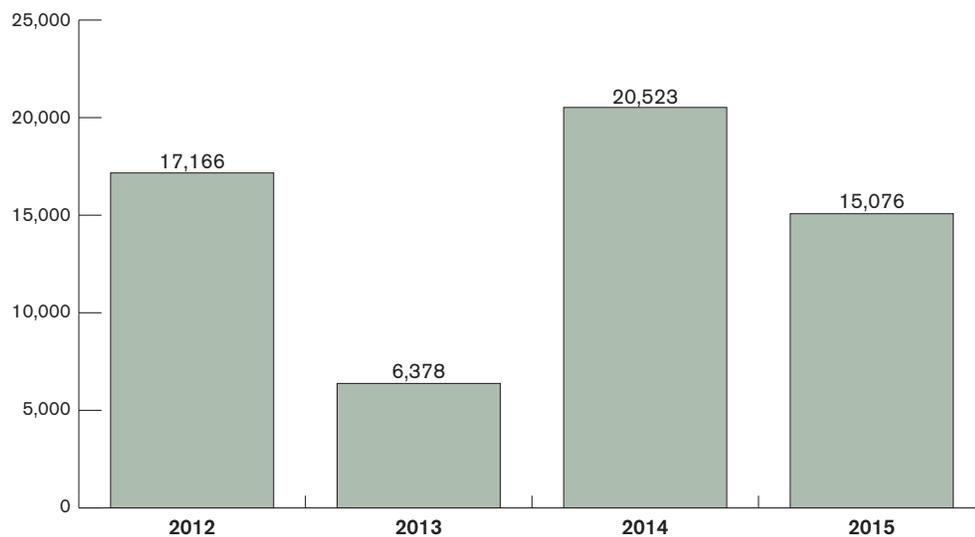
## Results: CFLR project impacts, FY 2014–2015

### Lakeview Stewardship CFLR project in FY 2014 and 2015

CFLR projects over the past four fiscal years (FY 2012 through FY 2015) have resulted in the treatment of 59,143 total acres in one or more CFLR program activities (see Figure 3, below). These restoration activities could include pre-commercial thinning, piling of small diameter trees, fuels reduction prescribed burns, and other related activities. In many cases, multiple restoration activities are completed on a single site. During FY 2014 and FY 2015, 35,599 acres were treated, a 12,000+ acre increase from FY 2012 and FY 2013 when a total of 23,544 acres were treated.

Year 2 of the Lakeview Stewardship CFLR project (FY 2013) had the fewest acres treated, primarily due to the 92,977-acre Barry Point Fire in the summer of 2012, which affected CFLR projects planned for that summer. Adjustments to the CFLR workplan in response to the Barry Point Fire resulted in increased areas treated during Year 3 (FY 2014), which had the highest amount of acres treated (see Figure 3, below).

**Figure 3 Total acres treated under the CFLR program in the Fremont-Winema National Forest, FY 2012– 2015**



Source: Lakeview Stewardship CFLR reports.



## Monitoring question: How much and what kinds of CFLR project work are captured locally?

### Context:

CFLRP projects may be accomplished through in-house Forest Service crews, service contracts with private businesses, timber sales for restoration-related byproducts, and partnerships with state agencies and non-profit organizations. Service contracts with private businesses may include work awarded to both local and nonlocal businesses. One important objective of the CFLR Program and its projects is to provide benefit to local rural economies, so the amount of project funding that is awarded to local contractors has implications for local economic benefit. Although contracts with nonlocally-based businesses can yield local economic impact through local purchases of supplies, materials, and living expenses, contracts with local businesses have a greater impact on local economies. Local capture of contract work depends on local contractor capacity for the types and amounts of work that are available. Our baseline analysis of local contractor capacity showed that a range of local contractors and timber purchasers were engaged in watershed and restoration work, timber purchases, and fire-suppression and support services during the FY 2004–2013 baseline period, with the number, size, and types of work contracts with local businesses varying greatly between years.<sup>4</sup> Local contractor capacity is dynamic and can change quickly between years based on the presence, skills, and availability of local businesses.

### Approach:

To understand CFLR project work conducted by local and non-local contractors, we reviewed the Federal Procurement Data System (FPDS) and Forest Service records. Examples of recent project activities have included forest thinning, meadow restoration, prescribed fires, invasive weed removal, and road decommissioning. We identified CFLR project contracts for FY 2014 and FY 2015 and then classified them according to work type and location. Work types were separated into five categories: equipment-intensive (e.g. mechanical tree thinning, grapple piling), material-intensive (e.g. road work, culvert work), labor-intensive (e.g. forest tree planting, hand thinning), professional services (e.g. engineering design, special studies), and technical services (e.g. weed abatement, plant surveys, timber marking). Following the same methods used during prior years, only those businesses located in Lake County or Bly, Oregon were classified as local for the analysis.

In addition to CFLR-related service contracts, we reviewed stewardship contract task orders, which include timber sale and service contract components, resulting from the CFLR project. The timber sale value from stewardship contract task orders comes from the Forest Service's Timber Information Management (TIM) records, and the service contract value comes from FPDS, as described above.

## Findings

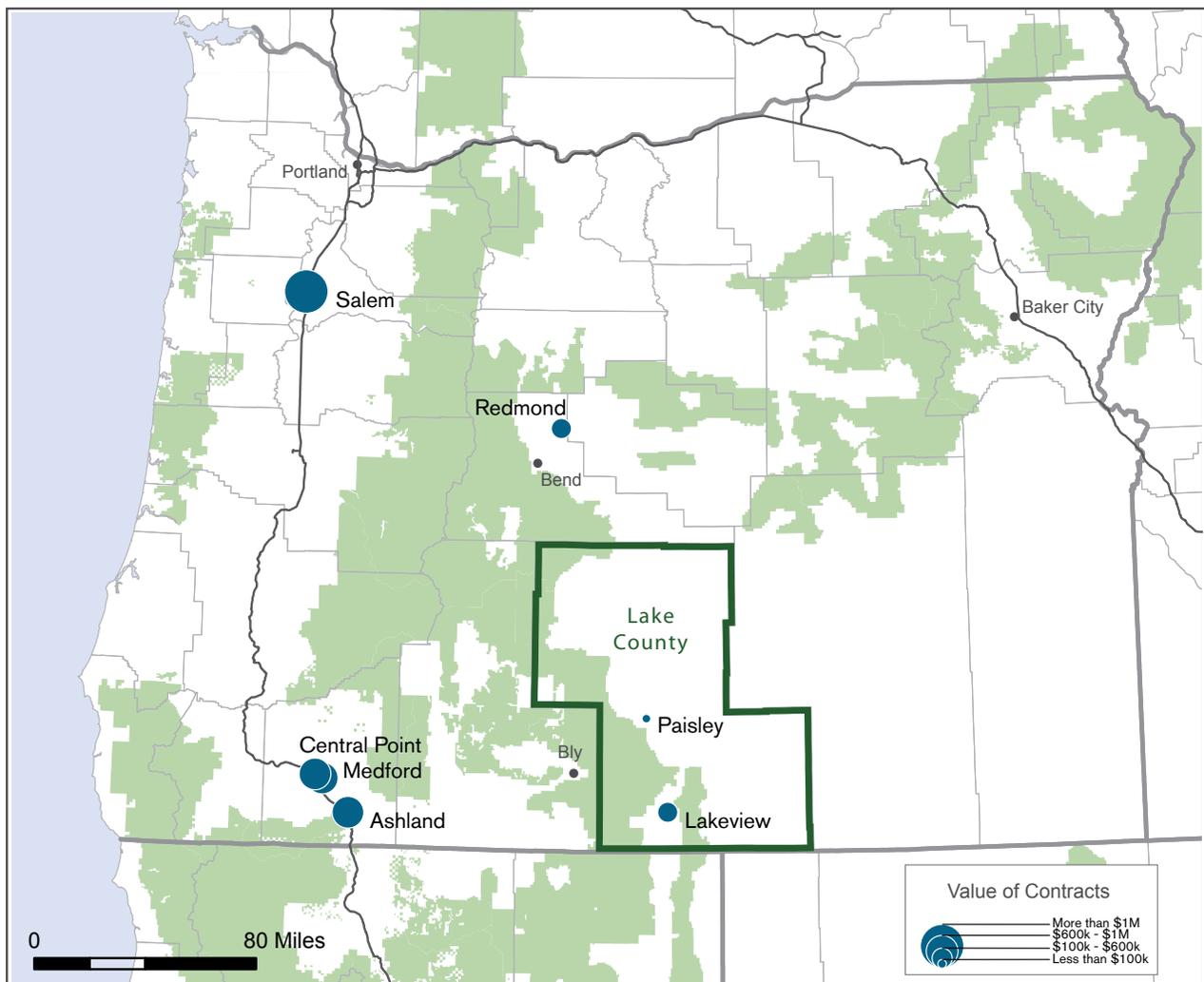
### Service contracts

In FY 2014 and 2015, a variety of community outreach activities for CFLR projects were implemented to enhance local contractor awareness and opportunities. Discussions were held with potential contractors in Lake County and county officials to promote restoration work opportunities. The CFLR coordinator on the Fremont-Winema National Forest worked with other organizations to better understand obstacles for local contractors, and to conduct an April 2015 seminar on “How to Contract with Federal Land Agencies” to encour-

age local businesses to become more involved in CFLR service contract bids.

In the map below (Figure 4), the dollars awarded to businesses for service contracts from the Lakeview Stewardship CFLR project in FY 2014 and 2015 are shown geographically. Businesses throughout Oregon received contracts, with businesses in the Salem and Medford areas obtaining large shares of CFLR service contract values. Local contractors within Lake County and in Bly received contracts, but the overall value captured by these businesses was much less.

**Figure 4 Restoration service contract dollars**



Local contractors captured 100% of CFLR work that was material-intensive in FY 2014 and FY 2015, but did not receive any other types of contracts during this timeframe (see Table 4, below). Despite outreach efforts to encourage greater local capture, only 5% of total CFLR service contract dollars went to local contractors during the two years. Non-local contractors obtained all of the equipment-intensive, labor-intensive, and technical services work associated with the CFLR project, totaling 95% of CFLR project funds spent on service contracts during FY 2014 and 2015. There were no professional-services contracts associated with the CFLR project from FY 2012–2015.

In contrast, during FY 2012 and FY 2013, local contractors received a substantial amount of technical services and equipment-intensive work, but over 89% of CFLR funds were still spent on contracts awarded to non-local firms. It is important to note, however, that the FY 2014 and FY 2015 data was collected from FPDS and Fremont-Winema National Forest records, which differs from the FY 2012 and FY 2013 data that compiled FPDS and Lakeview Stewardship CFLR report data. Due to differences in how FPDS service contract and Forest Service CFLR report data are compiled it was not possible to exactly reconcile these records for FY 2014 and FY 2015.<sup>5</sup>

**Table 4 Local capture and work type for service contracting with CFLR-coded and Forest Service matching funds, FY 2012-2013, and FY 2014-2015**

Contracted work type	2012–2013 non-local contract value and percentage	2012–2013 local contract value and percentage	2014-2015 non-local contract value and percentage	2014-2015 local contract value and percentage
Equipment (e.g. mechanical thinning, grapple piling)	\$257,790 (41%)	\$367,932 (59%)	\$3,439,275 (100%)	\$0
Labor (e.g. tree planting, hand thinning)	\$3,050,397 (100%)	\$0 (0%)	\$49,480 (100%)	\$0
Material (e.g. culvert replacement, fencing, road work)	\$0	\$0	\$0	\$258,182 (100%)
Professional (e.g. engineering, design)	\$0	\$0	\$0	\$0
Technical (e.g. invasive weed treatment, plant surveys)	\$6,768 (12%)	\$49,141 (88%)	\$1,406,938 (100%)	\$0
<b>Total</b>	<b>\$3,314,955 (89%)</b>	<b>\$417,073 (11%)</b>	<b>\$4,895,693 (95%)</b>	<b>\$258,182 (5%)</b>

Sources: Federal Procurement Data System and USDA Forest Service records

### Comparison to baseline

The baseline analysis presented in the previous monitoring report showed that 24% of total service contract dollars were awarded to local businesses during the FY 2007-2011 baseline period (see Table 5, below), including at least one contract with local firms in each of the five contract work categories. This suggests that a lower proportion of service contract dollars from the Lakeview Stewardship CFLR went to local contractors during all four years of the project reviewed thus far (FY 2012-2015) compared to the proportion of all restoration service contract dollars awarded locally prior to the project.

### Timber harvesting and stewardship task orders

The Forest Service awarded a 10-year stewardship contract with Collins Pine to conduct timber harvesting in the Lakeview Stewardship Unit. Since 2012, the Fremont-Winema has awarded task orders under this contract with timber sale and service components. When asked about their contractor base for the previous CFLR monitoring report, Collins Pine indicated that they primarily relied on Lake County and Bly, Oregon contractors to conduct timber harvest operations.<sup>6</sup>

Three CFLR stewardship task orders were awarded to Collins Pine during FY 2014-2015, all during FY 2014 (see Table 6, below). These task orders included nearly \$800,000 in timber product value and over \$650,000 in service contracts.

**Table 5 Baseline contracting for restoration work on Forest Service land in Lake County, Oregon, FY 2007–2011**

Contracted work type	Total contracts	Total contract value	Contracts with local contractors	Contract value with local contractors	Local capture
Equipment	18	1,194,814	7	843,736	71%
Labor	64	2,760,586	1	11,655	0%
Material	6	278,973	1	11,765	4%
Professional	9	241,760	1	19,885	8%
Technical	38	506,988	28	300,475	59%
<b>Total</b>	<b>135</b>	<b>4,983,121</b>	<b>38</b>	<b>1,187,516</b>	<b>24%</b>

Sources: Federal Procurement Data System and USDA Forest Service records

**Table 6 Stewardship task orders awarded to Collins Pine, FY 2014–2015**

Stewardship sale name	CCF	Value of product	Value of service	Total
Pilot	2,989 CCF	\$158,228	\$260,376	\$418,604
Drill	11,778 CCF	\$374,422	\$396,012	\$770,434
Hay	11,937 CCF	\$265,960	\$0	\$265,960
<b>Total</b>	<b>26,704 CCF</b>	<b>\$798,610</b>	<b>\$656,388</b>	<b>\$1,454,998</b>

Sources: Federal Procurement Data System and Timber Information Management System records

## Monitoring question: What are the local economic impacts of the CFLR project?

### Context:

Locally awarded contracts create local economic impacts through local employment and labor income. This monitoring question reviews the jobs and income created from the locally-awarded contracts identified in the previous monitoring question. The overall economic impacts associated with this monitoring question pertain only to contracts (service contracts or timber sales) with private businesses, and do not consider direct job impacts from agency employment or indirect impacts from spending of agency-paid labor income.

### Approach:

The analysis methods used in this report to estimate local job and labor income impacts for FY 2014 and 2015 differ from the methods used in the previous report. For this report, we used the Forest Service’s updated *Treatments for Restoration Economic Analysis Tool* (TREAT), an economic impact analysis model, to estimate the number of jobs and income provided by CFLR projects. TREAT was developed by national forest economists specifically to standardize the approach to estimating the number of jobs that would be supported by restoration efforts across CFLR projects and monitoring teams that have varying economic analysis capacities.<sup>7</sup>

TREAT estimates local employment and labor income levels originating from specified funding amounts and funded activities. Although the previous report does include analysis with the

TREAT model for FY 2012 and 2013 that are reported below, it is important to note that modifications to the TREAT model between the previous and current analysis periods would make direct comparisons inaccurate.<sup>8</sup> Since the prior report, TREAT has been updated to improve the reliability of economic estimates and is significantly different from the previous version. Future monitoring working papers will include TREAT estimates based on the updated model. TREAT estimates report out in “job years”—each estimated job lasts one year.

### Findings

The number of Lake County jobs supported from CFLR-specific funds varied from year to year (see table 7, below), with FY 2012 and FY 2015 being roughly similar and FY 2013 and FY 2014 were roughly similar, although, as noted above, modifications to the TREAT model between the FY 2012–2013 and the FY 2014–2015 monitoring periods limit direct comparisons across years. Previous monitoring suggests that the TREAT model used to estimate the numbers in Table 7 likely overestimated job numbers for FY 2012 and 2013.<sup>9</sup> Only CFLR-coded funding (funds in the CFLR/CFLN category) were used in this analysis, and matching funds from the Forest Service or partner agreements were not included in calculations. Because timber sales do not use CFLR job codes, their impacts do not show up in this analysis using CFLR-coded funding.

**Table 7 Total part- and full-time jobs supported in Lake County from CFLR funds, estimated from the Forest Service Treatments for Restoration Economic Analysis Tool (TREAT), FY 2012–2015**

CFLR funds only	FY 2012	FY 2013	FY 2014	FY 2015
Commercial forest product processing	0	0	0	0
In-woods restoration work	18	9.3	5.9	20
<b>Total</b>	<b>18</b>	<b>9.3</b>	<b>5.9</b>	<b>20</b>

Source: Lakeview Stewardship CFLR reports.

Note: Jobs reported do not include Forest Service employment

When considering the full economic impact of the CFLR project in Lake County, including timber harvest numbers and matching funds, TREAT estimated that CFLR projects (CFLR coded projects and Forest Service matching funds) created or maintained 255 direct and indirect jobs in Lake County during FY 2014-2015 and a total labor income of

\$13,916,557 was generated (see Table 8, below). This includes not only direct CFLR project-related jobs but indirect jobs from suppliers, retailers, and service providers in the local community. Per fiscal year totals were 95 jobs and \$5.2 million in labor income for FY 2014, and 160 jobs and \$8.7 million in labor income for FY 2015 (see Table 9, below).

**Table 8 Total Lake County private sector jobs and income (TREAT: FY 2014 & FY 2015, includes matching funds)**

Type of project	Direct jobs	Total jobs	Direct labor income	Total labor income
Commercial forest product activities	139.2	209.3	\$9,248,814	\$12,206,077
Other project activities	38.3	45.7	\$1,526,618	\$1,710,480
<b>Total</b>	<b>177.5</b>	<b>255</b>	<b>\$10,775,432</b>	<b>\$13,916,557</b>

Source: Lakeview Stewardship CFLR reports.

**Table 9 Lake County private sector jobs and income per fiscal year (TREAT: FY 2014 & FY 2015, includes matching funds)**

Types of projects	Direct part- and full-time jobs FY 2014	Total part- and full-time jobs FY 2014	Direct labor income FY 2014	Total labor income FY 2014	Direct part- and full-time jobs FY 2015	Total part- and full-time jobs FY 2015	Direct labor income FY 2015	Total labor income FY 2015
Commercial forest product activities	60.2	87.3	\$3,897,848	\$5,022,893	70	122	\$5,350,966	\$7,183,184
Other project activities	6.3	7.7	\$163,668	\$202,802	32	38	\$1,362,950	\$1,507,678
<b>Totals</b>	<b>66.5</b>	<b>95.0</b>	<b>\$4,061,516</b>	<b>\$5,225,695</b>	<b>111</b>	<b>160</b>	<b>\$6,713,916</b>	<b>\$8,690,862</b>

Source: Lakeview Stewardship CFLR reports.



## Monitoring question: What are the costs, benefits, and outcomes of different project implementation mechanisms?

### Context:

CFLR projects may be accomplished through a variety of implementation mechanisms, including with in-house Forest Service crews, service contracts with private businesses, and partnerships with state agencies and non-profit organizations. Each of these mechanisms can have different costs, benefits, and outcomes. This report provides examples of the different mechanisms used during FY 2014 and 2015 to accomplish CFLR-related project efforts, and outcomes associated with the efforts.

### Approach:

We provide examples of outcomes from contracts and partner agreements that were reported by the Forest Service in the Lakeview Stewardship CFLR annual reports.

## Findings

The Forest Service uses service contracts and partnership agreements to conduct different types of work, although the type of work involved in agreements appears to be evolving. The Forest Service appears to use contracts for implementation activities such as thinning, and to a lesser extent stream restoration whereas they have used partnership

agreements for monitoring and a diversity of restoration activities, including piling and hazard reduction, fencing, and trail maintenance.

During the first four years of the CFLR project, annual agreements with the Lake County Resource Initiative helped fund the Chewaucan Biophysical Monitoring Team. The project began in 2002, and one of its goals is to provide Lake County students with natural resource field training. This group now gathers important ecological field data for the CFLR project. High school and college students collected data and conducted monitoring activities in support of the Lakeview Stewardship Group's Chewaucan Biophysical Monitoring Project, with supervision from an adult crew leader trained and skilled in data collection and monitoring activities.

The Central Oregon Intergovernmental Council and the Northwest Youth Corps have worked with the Fremont-Winema NF for many years on trail maintenance and other related projects. These field crews provide essential labor-intensive work to support CFLR goals. A new partnership agreement with the Paisley Youth Conservation Corps was formed in 2014 and this group of high school-age students conducted trail maintenance and restoration activities in FY 2014 and FY 2015.<sup>10</sup>

**Table 10 Example outcomes from contracts and partner agreements reported by the Forest Service, FY 2014 and FY 2015**

	2012	2013	2014	2015
Contracts	<ul style="list-style-type: none"> <li>▪ Pre-commercial thinning on 3,256 acres in Jakabe and Launch projects</li> <li>▪ 3 miles of streambank stabilization and 15 acres of riparian restoration</li> <li>▪ 315 acres of aspen restoration</li> <li>▪ 1,171 of juniper thinning</li> </ul>	<ul style="list-style-type: none"> <li>▪ Pre-commercial thinning of 376 acres in the Burnt Willow Environmental Assessment</li> <li>▪ Pre-commercial thinning on 693 acres in the Jakabe project</li> <li>▪ Pre-commercial thinning on 1,619 acres in Foster and Wooley Creek subwatersheds</li> </ul>	<ul style="list-style-type: none"> <li>▪ WRZ multi-treatment/ Jakabe fuels reduction on 1,775 acres</li> <li>▪ Pre-commercial thinning of 1,367 acres in the Burnt Willow Environmental Assessment</li> <li>▪ Fuels reduction thinning of 683 acres under the Deuce pre-commercial thinning project</li> </ul>	<ul style="list-style-type: none"> <li>▪ West Drows Environmental Assessment pre-commercial thinning/ juniper/piling project on 1,064 acres</li> <li>▪ Coffee Pot fuels reduction project on 1,800 acres</li> <li>▪ Dairy Creek large wood restoration project</li> </ul>
Partner agreements	<ul style="list-style-type: none"> <li>▪ 67 sites established or resurveyed, new landscape monitoring sites established, and 500 toe plots completed by the Chewaucan Biological Monitoring Team</li> <li>▪ 153 miles of trail restoration by Northwest Youth Corps, Central Oregon Intergovernmental Council, and others</li> <li>▪ Material, fencing, and labor in the Chewaucan Aquatic Habitat Restoration project with local ranchers and landowners</li> </ul>	<ul style="list-style-type: none"> <li>▪ 68 sites established, 40 soil disturbance surveys, and stream water sampling completed by the Chewaucan Biological Monitoring Team</li> <li>▪ 86 miles of trail restoration by Northwest Youth Corps, Central Oregon Intergovernmental Council, and others</li> <li>▪ 5 acres of hand piling of slash, 38 acres of juniper slash reduction, 138 acres of aspen enhancement, 10 acres of fuels treatment, and recreation site fence repair by Warner Creek Correctional Facility crews</li> </ul>	<ul style="list-style-type: none"> <li>▪ Warner Creek Correctional Facility performed 75 acres of hand-piling small diameter material in conifer stands and 160 acres of hand-piling cut material in aspen stands</li> <li>▪ Central Oregon Intergovernmental Council restored and maintained 11.5 miles of trails, cleared paths for ADA-accessible recreation facilities, and installed a dock to mitigate lakefront erosion</li> <li>▪ Northwest Youth Corps maintained 68 miles of recreation trails</li> </ul>	<ul style="list-style-type: none"> <li>▪ Central Oregon Intergovernmental Council constructed 2.7 miles of cattle exclusion fences, maintained 12 miles of trails, removed hundreds of hazardous trees, and conducted other recreation-oriented restoration activities</li> <li>▪ Northwest Youth Corps bucked and cleared approximately 962 trees, repaired 25 drainage structures, and dropped and bucked 500 standing dead trees that were a hazard to public visitors</li> <li>▪ Youth Conservation Corps manually treated 184.9 acres of invasive musk thistle</li> </ul>

Source: Lakeview Stewardship CFLR reports



#### 2014

In FY 2014, partner agreements contributed \$239,178 to CFLR projects (see Table 11, below). Agreements were made with a variety of agencies and organizations, including: the Oregon Department of Corrections, Lake County Weed Board, Lake County Resource Initiative, Lake County Umbrella Watershed Council, Northwest Youth Corps, and the Central Oregon Intergovernmental Council. No in-kind contributions were included in FY 2014 CFLR reports. Contributed funds via agreements in FY 2014 were less than in FY 2013 (\$682,134), but were similar to the amount partner agreements contributed in FY 2012 (\$243,246).

#### 2015

In FY 2015, funds from partner agreements contributed \$346,038 to CFLR projects and included many of the same organizations who participated in FY 2012, 2013, and 2014 CFLR projects. For FY 2015, these groups included: the Oregon Department of Corrections, Lake County Weed Board, Lake County Resource Initiative, Northwest Youth Corps, and the Central Oregon Intergovernmental Council. In-kind contributions in FY 2015 were estimated to be worth \$64,182 and included projects with the Nature Conservancy, Lake County Resources Initiative, and the Oregon Department of Forestry. This in-kind contribution was much higher than previous annual in-kind contributions during FY 2012, 2013, and 2014.

**Table 11 Partner agreement funds and in-kind contributions, FY 2012–FY 2015**

Type of project	2012	2013	2014	2015
Contributed funds via agreements	243,246	\$682,134	\$239,178	\$346,038
In-kind contributions	\$18,909	\$14,700	NA	\$64,182
<b>Total</b>	<b>\$262,155</b>	<b>\$696,834</b>	<b>\$239,178</b>	<b>\$410,220</b>

Source: Lakeview Stewardship CFLR reports.

## Monitoring question: What are the total and matching funds used in the CFLR Project?

### Context:

CFLR projects are funded through direct CFLR funds as well as Forest Service matching funds, partner agreements, and in-kind contributions. Understanding how much funding comes from each of these sources is important for understanding the impact of the Lakeview Stewardship CFLR project and funds. The CFLR law requires a 50 percent match of CFLR funds. These can come from Forest Service and non-Forest Service sources.

### Approach:

We reviewed Lakeview Stewardship CFLR annual reports to identify the amount of non-CFLR funds used in CFLR-related activities, including Forest Service matching funds, funds contributed via agreements, and in-kind contributions.

## Findings

Direct Forest Service funding for the Lakeview Stewardship CFLR project varied from \$1.8 to \$2.7 million annually during the first four years of the project (see Table 12, below). In addition to direct

funding for CFLR projects, the Forest Service provides matching funds to support CFLR projects. Internal matching funds from other sources more than doubled the amount of Forest Service funding available for CFLR projects. These other internal matching funds increased greatly between FY 2012 and FY 2013 (from \$2.5 to \$5.3 million), and they remained relatively high (\$4.6 million) in FY 2014. In 2015, Forest Service matching funds decreased from the previous 2 years, but remained higher than FY 2012 direct funding.

As discussed in the previous section, partner agreements with state, local, and non-profit organizations provided significant contributions to CFLR projects through both contributed funds and in-kind donations. These organizations have leveraged funds to support CFLR projects and have assisted in project implementation and monitoring activities to support CFLR goals. These funds and in-kind contributions, in combination with Forest Service direct and matching funds, make up the total funding for the first four years of the Lakeview Stewardship CFLR project (FY 2012–2015), which varied from \$4.8 to \$8.0 million annually.

**Table 12 Direct, matching, and contributed funding in support of CFLR projects, FY 2012–FY 2015**

	2012	2013	2014	2015
Direct CFLR funds expended	\$2,088,646	\$2,037,204	\$2,707,036	\$1,824,530
Forest Service matching funds	\$2,475,267	\$5,278,075	\$4,567,687	\$2,761,358
Contributed funds via agreements	\$243,246	\$682,134	\$239,178	\$332,062
In-kind contributions	\$18,909	\$14,700	NA	\$64,182
<b>Total</b>	<b>\$4,826,068</b>	<b>\$8,012,113</b>	<b>\$7,513,901</b>	<b>\$4,982,132</b>

Source: Lakeview Stewardship CFLR reports.



## Conclusions

Management efforts on national forests have effects on local communities and economies. The Collaborative Forest Landscape Restoration (CFLR) Program acknowledges these socioeconomic impacts and was established to promote local benefit in rural economies alongside collaborative, science-based ecosystem restoration. This monitoring report is part of the ongoing effort to evaluate socioeconomic trends and impacts of the Lakeview Stewardship CFLR Project, along with progress in meeting CFLR program socioeconomic local benefit objectives.

In the first four years of the project, adjustments in methodology for measuring local capture, alongside adjustments in the US Forest Services economic modeling tools, prohibit direct comparisons between monitoring years and with the baseline assessment years for some of the socioeconomic monitoring questions. Ongoing monitoring for subsequent years will be better able to compare like measures across recent years. Although direct comparisons are not possible, it is evident that across the first four years of monitoring thus far, the majority of CFLR restoration contracts for the project have been awarded to nonlocal contractors. Local contractors received between five and eleven percent of CFLR contract funds during each of the 2-year periods reviewed thus far. In comparison with the baseline analysis of restoration contract capture from FY 2007–2011, lo-

cal contractors appear to have captured a smaller proportion of CFLR project contract funds overall than the proportion of all restoration contract dollars captured during baseline years. It is not clear why this is the case, and ongoing monitoring reports will need to explore this further.

Work during the first four years of the Lakeview Stewardship CFLR project was accomplished through different sized and scoped projects and partnership agreements, which offer timely examples of how restoration work can be completed in different ways. Ongoing monitoring work will further examine these examples alongside those in subsequent years to better understand the costs, benefits, and outcomes of different mechanisms for implementing project work.

Social and economic monitoring of the Lakeview Stewardship CFLR project will continue in the coming years. Future monitoring will provide indication of the barriers preventing increased local contracting, and of the effectiveness of ongoing efforts to increase the amount of local contracting for the project. An additional focus of future monitoring will be developing a more complete picture of how different contracting practices and implementation mechanisms accomplish CFLR work, and of the different ways Forest Service partners contribute to this work to achieve project goals.

## Appendix A:

### Local businesses contracting with the Forest Service for restoration and fire suppression and fire support

Businesses in Lake County and Bly, Oregon work with the Forest Service on restoration projects, timber harvesting, and fire suppression and support services. These businesses perform work in Lake County and in other areas. Table A1, page 21, includes a list of local contractors. The list is separated by restoration work, timber sales, and fire suppression and support activities. Although many of these contractors, especially those related to fire suppression and support, are not supported

by CFLR funding, this list highlights local contractor capacity in Lake County and Bly, Oregon. Data for the list was obtained from USDA Forest Service databases of primary contractors and timber purchasers. Collins Pine and other vendors may subcontract work out to additional local contractors who are not on this list. These subcontractors also provide valuable services and are a vital element of the local contractor base.

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#### Endnotes

- 1 For further information, see Social and Economic Monitoring for the Lakeview Stewardship Collaborative Forest Landscape Restoration Project, Fiscal Years 2012 and 2013 at [https://ewp.uoregon.edu/sites/ewp.uoregon.edu/files/WP\\_55.pdf](https://ewp.uoregon.edu/sites/ewp.uoregon.edu/files/WP_55.pdf).
- 2 Lakeview Stewardship Group. 2011. Lakeview Stewardship Landscape. Available at <http://www.fs.fed.us/restoration/documents/cflrp/2011Proposals/Region6/FremontWinema/Lakeview.docx>.
- 3 Lakeview Collaborative Forest Landscape Restoration (CFLR) Project Monitoring Plan. Ecosystem Workforce Program, University of Oregon. Working Paper #60. Available at: [https://ewp.uoregon.edu/sites/ewp.uoregon.edu/files/WP\\_60.pdf](https://ewp.uoregon.edu/sites/ewp.uoregon.edu/files/WP_60.pdf).
- 4 White, E.M., E.J. Davis, and C. Moseley. 2015. Social and Economic Monitoring for the Lakeview Stewardship Collaborative Forest Landscape Restoration Project. Ecosystem Workforce Program, University of Oregon. Working Paper #55. Available at [http://ewp.uoregon.edu/sites/ewp.uoregon.edu/files/WP\\_55.pdf](http://ewp.uoregon.edu/sites/ewp.uoregon.edu/files/WP_55.pdf).
- 5 The Lakeview Stewardship CFLR report data was compiled differently from what is collected in the Federal Procurement Data System (FPDS). The FPDS records used CFLR awarded contracts by year and the CFLR reports followed Forest Service protocol for CFLR analysis. The FY 2014 and FY 2015 data included CFLR project data from FPDS and project data provided by Fremont-Winema National Forest personnel.
- 6 White, E.M., E.J. Davis, and C. Moseley. 2015. Social and Economic Monitoring for the Lakeview Stewardship Collaborative Forest Landscape Restoration Project. Ecosystem Workforce Program, University of Oregon. Working Paper #55. Available at [http://ewp.uoregon.edu/sites/ewp.uoregon.edu/files/WP\\_55.pdf](http://ewp.uoregon.edu/sites/ewp.uoregon.edu/files/WP_55.pdf).
- 7 Treatments for Restoration Economic Analysis Tool User Guide. US Forest Service. Available at: <https://www.fs.fed.us/restoration/documents/cflrp/TREAT/TREATUserGuide20151005.pdf>.
- 8 The first working paper used an IMPLAN analysis of service contracts in the Federal Procurement Data System. This analysis was preferable to the FY 2012 and FY 2013 TREAT model outputs due to issues identified in the older TREAT model. The recent TREAT modifications have addressed these issues.
- 9 See pages 15-16 in: White, E.M., E.J. Davis, and C. Moseley. 2015. Social and Economic Monitoring for the Lakeview Stewardship Collaborative Forest Landscape Restoration Project. Ecosystem Workforce Program, University of Oregon. Working Paper #55. Available at [http://ewp.uoregon.edu/sites/ewp.uoregon.edu/files/WP\\_55.pdf](http://ewp.uoregon.edu/sites/ewp.uoregon.edu/files/WP_55.pdf).
- 10 White, E.M., E.J. Davis, and C. Moseley. 2015. Social and Economic Monitoring for the Lakeview Stewardship Collaborative Forest Landscape Restoration Project. Ecosystem Workforce Program, University of Oregon. Working Paper #55. Available at [http://ewp.uoregon.edu/sites/ewp.uoregon.edu/files/WP\\_55.pdf](http://ewp.uoregon.edu/sites/ewp.uoregon.edu/files/WP_55.pdf).

Table A1 Local businesses contracting with the Forest Service for restoration and fire suppression services and timber purchases

		Years with contract(s)												
Business	Activity	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	
Restoration	Anderson Engineering & Surveying, Inc	Professional							x	x				
	Carlson's Gravel Pit, LLC	Material										x		
	Dame Joseph	Labor						x						
	Dog Lake Construction LLC	Equipment		x	x	x								
	Ecosystems Management Inc	Technical			x	x	x	x	x	x	x	x	x	
	High Grade Contracting	Equipment										x		
	Jacobs Kenneth Wayne	Equipment					x							
	Jefco Enterprises	Material											x	
	Lockett Trucking Incorporated	Equipment			x				x					
	Lytle Simms	Labor	x											
	Natural Resource Innovations LLC	Technical							x					
	Perry Watson	Labor	x	x										
	Perry Watson	Technical	x	x										
	Richmond John F Contracting	Material				x								
	Shari Reed	Technical				x	x	x	x	x	x			
	Tall Town Equipment	Technical										x	x	
	Terrence R Murray	Equipment	x		x									
Zamudio, Karen A	Technical									x				
Timber	Collins Pine	Timber purchase	No data					x	x	x	x	x	x	
	Tom Harmon Logging	Timber purchase	No data						x	x	x			
Fire suppression*	Bradley Forest	Fire		x										
	Blackhawk Enterprises	Fire						x	x				x	
	Cobian Gabe Trucking	Fire				x								
	Danny Lee	Fire		x										
	David L. Holgate	Fire		x										
	Davidson Floyd	Fire		x	x									
	Desert Springs Trucking Limited Liability Company	Fire		x					x	x				
	Dog Lake Construction Limited Liability Company	Fire								x			x	
	Donald T. Oconnor	Fire		x										
	Gearhart Events	Fire		x										
	Elliot, Rick D	Fire					x		x		x		x	
	Gary Mcclseese And Son Equipment	Fire		x										
	Gloria Babb	Fire		x										
	Harlan Ray Logging Incorporated	Fire								x			x	
	Hartman Willmetta	Fire		x										
	Jacobs Kenneth Wayne	Fire		x						x			x	
	James M. Nottier	Fire		x	x	x								
	Lee Wayne	Fire		x	x									
	Lindsey, John E.	Fire		x	x	x								
	Lytle Simms	Fire											x	
	Lockett Trucking Incorporated	Fire			x				x				x	
	Montgomery Montie Incorporated	Fire		x										
	Northwest Forest Industries LLP	Fire		x										
	Oleary Equipment	Fire		x										
	Ortega Pamela	Fire		x										
	Partridge Warren Contracting	Fire							x				x	
	Robison Jimmy D.	Fire		x										
	Sheridan And Messner Joint Venture	Fire		x										
	Stewarts Firefighters Food Catering	Fire	x	x	x	x	x	x	x	x	x	x	x	x
	Fish And Fire LLC	Fire										x		x
Ward John	Fire							x					x	
Wayne Eleehmann Contractor	Fire		x					x	x					
Wessel, Jeff And Billi	Fire								x				x	
Withrotor Aviation Inc.	Fire		x				x		x	x	x	x	x	

\* Fire suppression indicates businesses that had preseason agreements with the US Forest Service prior to each year's fire season. Data were obtained from the Virtual Incident Procurement System (VIPR)

Source: Business names are those entered in the Federal Procurement Data System records. Data was obtained from FPDS, VIPR, and other Forest Service data sources.

