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MEMORANDUM

August 27, 2024

To: Cooperative Monitoring, Evaluation, and Research Committee (CMER)

From: Schedule L-1 Cooperative, Monitoring, and Research Committee (CMER) Workgroup:
Welles Bretherton (Washington State Department of Ecology)
Theryn Henkel (DNR, AMP Project Manager)
Debbie Kay (Westside Tribes, Suquamish Tribe)
Mark Meleason (Counties)
Chris Mendoza (Conservation Caucus)
Rachel Rubin (DNR, CMER Scientist)

Subject: Process for Formation of Subject Matter Expert (SME) Groups to Provide Independent Review for Schedule L-1 Revision

Introduction:

The Schedule L-1 CMER Workgroup (Workgroup henceforth), is proceeding through the Schedule L-1 Review and Revision Process as outlined in the approved memo to the TFW Policy, TFW Policy SAO Workgroup, and CMER on September 6, 2023. The approved process has five steps (this memo addresses step 3):

1. Historical Review - gather information to document previous process of establishing original Schedule L-1. (Completed)
2. Prioritize Review - identify the Functional Objectives and Performance Targets that need more clarity and refinement. (Completed per approved memo dated March 7, 2024)
3. ***Establish Subject Matter Expert(s)(SME) Group(s) - define the appropriate expertise necessary to be a SME in the AMP based on the topic. Determine capacity to contribute to the decision criteria review/revision process and identify individuals or groups within or outside CMER to serve in this role. The Schedule L-1 Workgroup acknowledges that the Principal Investigators may serve this role for active projects (SME knowledge and capacity gaps, scope alternatives for filling gaps).***
4. Review Evidence - assess the current state of scientific knowledge and identify what is needed to affirm, refine, or develop Performance Targets based on best available science.
5. Identify measurable criteria for Performance Targets - clearly stated Functional Objectives and measurable Performance Targets identified through evidence review.

As a reminder, there are nine Performance Targets that are up for review, divided into three groups, as approved by CMER and TFW Policy committees on February 27, 2024, and March 7, 2024, respectively. The Performance Targets and Groups are as follows:

- a. Shade, Riparian Condition, Litterfall, In-Stream LWD
- b. Pool Frequency, Pool Depth, Peak Flows, Fines in Gravel
- c. Wetlands

This memo describes a proposed process for forming SME groups, the expertise needed for individual SME group members, and information and guidance that will be provided to the SMEs upon group formation (attachment).

Group Formation Process:

To maintain the credibility of the recommendations produced by the SME groups, it will be imperative that these groups remain independent, both in perception and reality. To that end, SME groups should not include any scientists that are members of caucuses. To foster this independence, we propose using our Independent Scientific Peer Review (ISPR) contract with University of Washington (UW) to establish scientists, based on the criteria/expertise listed below, to participate in the SME groups. We have verified with the UW contractor that this is a valid use under our contract and that they would be willing to accommodate this task. This process will ensure scientific objectivity and that deadlines are met to accomplish the SL1 review and revision in FY2025. In addition to the ISPR established scientists, each SME group will have a CMER Scientist with the appropriate expertise assigned to the group to provide feedback and offer support regarding the Adaptive Management Program goals, processes, and nuances. To maintain the independence discussed above, the CMER Scientists would not make specific recommendations for new Performance Targets, rather would provide guidance. Lastly, there will be one DNR Project Manager assigned across all groups to provide continuity and flag issues as they arise. Based on current capacity and expertise, the CMER Scientist assigned to Groups a and b (described above) would be Rachel Rubin, Group c would be Tanner Williamson, and the Project Manager (PM) would be Theryn Henkel.

We propose that an attempt is made to keep the groups as small as possible while ensuring the proper expertise is present. The SL1 review is on a specific schedule and a smaller group will aid in expediting the process, scheduling meetings, etc. We do not want to limit groups to a specific number, as having the proper expertise is more important and that may need to be a different number for each group. Ideally, the groups would be around five members not including the PM and the CMER Scientist.

Subject Matter Expert Criteria/Expertise:

This section describes the expertise that should be present overall and within each group. One individual may have expertise that crosses multiple criteria on the list.

General Expertise for All Groups:

- Local and landscape scale perspectives on for the parameters up for review
- Diverse backgrounds (e.g. academia, field work, etc.)
- Knowledge of Northwest ecology (forest, riparian, wetland)
- An understanding of the processes that form salmonid habitat and the other species that will utilize that habitat

- Experience with reviewing forest or other land use impacts related to aquatic resource protection (e.g. clean water, wetlands, etc.)
- Familiarity with the predicted climate change scenarios for the PNW

Expertise for Group A (Shade, Riparian Conditions, Litterfall, In-Stream LWD)

- Riparian and in-stream organisms and their habitat requirements by life stage
- Effects of natural and anthropogenic disturbances
- Stream / riparian ecology
- Experience with functions that support fish habitat in streams including seasonal and off-channel habitat
- Forest / Instream Hydrology (structure and function of large wood recruitment, loading dynamics, modelling, upslope sources)
- Riparian shade / heat energy
- Forest ecology

Expertise for Group B (Pool Frequency, Pool Depth, Peak Flows, Fines in Gravel)

- Stream channel formation, channel erosion and degradation
- Fresh water / Instream biologist (trophic pathways)
- Above ground and below ground water movement (snowpack vs springfed)
- Effects of timber harvest on these resources (including effects of cutting trees and building roads on water quality)
- Hydrology
- Geomorphology (fluvial, hydro)
- Riparian and in-stream organisms and their habitat requirements by life stage
- Experience with functions that support fish habitat in streams including seasonal and off-channel habitat
- Familiarity with the habitat-forming process such as LW recruitment from the riparian and upslope sources

Expertise for Group C (Wetlands)

- Wetland organisms and their habitat requirements
- Wetland hydrology and soils
- Carbon cycling above ground and below ground (climate change and biogeochemistry/nutrient cycling)
- Wetland development
- Wetland restoration and succession
- Intersection of processes with climate change
- Multi-Disciplinary wetland science
- Stream / riparian ecology
- Familiarity with unique wetland systems in Washington
- Disturbance/system recovery in wetlands
- Wetland Hydrology
- Wetland functional assessment

Guidance to Subject Matter Experts

Attached to this memo is a guidance document which would be delivered to the SMEs upon assignment. It outlines some general expectations for process and deliverables from the SMEs and includes some direct questions for them to consider while assessing the relevant Performance Targets for revision. In the document there are questions which have workgroup consensus to move forward and then questions that did not received workgroup consensus. The questions without consensus revolve around one main issue within the workgroup by embedding the Overall Performance goals listed in SL1 into the questions to SMEs, which state:

“Forest practices, either singly or cumulatively, will not significantly impair the capacity of aquatic habitat to:

- a) Support harvestable levels of salmonids;
- b) Support the long-term viability of other covered species; or
- c) Meet or exceed water quality standards (protection of designated uses, narrative and numeric criteria, and antidegradation).”

The SME groups will be provided the entirety of SL1 and therefore will see the Overall Performance Goals in context and where they fit into the hierarchy of Functional Objectives and Performance Targets. There is consensus in the workgroup that the Overall Performance Goals provide important context for the revision of the Performance Targets. Disagreement lies in whether or not to use the Overall Performance goals in direct guidance questions to the SMEs, and there are a variety of opinions in the Workgroup. Consult the [opinion documents](#) if there is interest in understanding these viewpoints.

Summary

The Workgroup is seeking approval of the recommended process for forming the SME groups as well as the attached Guidance document which would be delivered to the SMEs upon assignment. Once a process is approved, groups will be formed and the process will proceed to Step 4 above, which is to review scientific evidence and make recommendations for Performance Target revision.

Attachments:

- Subject Matter Expert Guidance Letter