

AMERICA'S LONGLEAF RESTORATION INITIATIVE

Shared Stewardship Performance Pilot



Piney Grove preserve © Bobby Clontz/TNC

Colette DeGarady, The Nature Conservancy

September, 2021

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Purpose

The Purpose of this report is to demonstrate how the longstanding collaboration [America's Longleaf Restoration Initiative](#) (ALRI) is a model for the US Forest Service (USFS) concept of [Shared Stewardship](#). ALRI has been working in the right places, in the right way and at the right scale for more than 10 years. This report describes the evolution of ALRI, the governance structure, how ALRI chose where to work, success stories and examples, lessons learned and adaptive management practices.

Acknowledgements

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ASSEMBLING A SUCCESSFUL COLLABORATION

The Need

Longleaf pine-dominated forests occupied approximately 92 million acres from east Texas to southern Virginia in the southeast at the time of European discovery of the New World. These systems existed in a myriad of forms on an array of soil types but were united in common features – the dominance or co-dominance of longleaf pine (*Pinus palustris*) and open, park-like understory full of warm-season grasses and a rich diversity of forbs. The driver of such a structure, seen so widely and uniformly across a massive region, was fire – very regular, low-intensity ground fires lit from natural and anthropogenic sources.

This disturbance of periodic fires paved the way for one of the most diverse ecosystems on the planet providing habitat to abundant wildlife and resources for people. Conversion of this vast forest for development, agriculture, and timber operations with alternative pine species reduced the longleaf forests to less than 3% of its historic range making it one of the most endangered ecosystems in North America. These threats still remain.

Forming the Partnership

In 2005, a group convened by the Longleaf Alliance articulated the need for a focused, range-wide restoration approach, which they named *America's Longleaf- A Restoration Initiative for the Southern Longleaf Pine Forest*. At the same time, a partnership of several states and federal agencies in the Southeast formed to promote better collaboration in making resource-use decisions. Known as the Southeast Regional Partnership for Planning and Sustainability (SERPPAS), the group identified "Sustaining the Land of the Longleaf Pine" as one of its top conservation priorities. This convergence of interests generated tremendous enthusiasm and momentum.

To harness this interest in longleaf restoration, under the leadership of the USDA Forest Service, Department of Defense, and U.S. Fish and Wildlife Service, a Regional Working Group of diverse organizations was formed in October 2007 to develop America's Longleaf Restoration Initiative (ALRI). A Steering Committee of the Regional Working Group was tasked with developing a Conservation Plan and launching ALRI as an umbrella for the collaborative efforts by many stakeholders to ensure the Conservation Plan's implementation. The Initiative is also a vehicle for raising the profile of longleaf as a conservation concern, regionally and nationally, and for generating broad public support.

Guiding Principles

There are several guiding principles that shaped how the ALRI proposed to approach the range-wide conservation of longleaf ecosystems. Accordingly, these guiding principles are intrinsic to shaping the thoughts, recommendations, organization, and content of a unifying and purposeful Conservation Plan:

Strategic, Science-based Approach- The success of ALRI hinges on a strategic, science-based approach to conservation. This approach serves as a framework for identifying, prioritizing, integrating and evaluating the efforts and activities of the partnership with the purpose of targeting conservation efforts in ways that most effectively contribute to stated objectives.

Site-based Conservation Efforts in the Context of Sustainable Landscapes- All habitat-based conservation actions must ultimately affect habitat availability and condition at the site level. Site-specific, local scales are where habitat conservation "hits the ground." However, local habitat projects need to be planned and implemented in the context of their role in most effectively contributing to objectives (*e.g.*, population viability, biodiversity, ecosystem services, or socio-economic values) that are only realized at much larger spatial scales. Through a strategic, science-based approach ALRI guides, coordinates and supports the site-based habitat conservation efforts of its partners and link them across spatial scales.

Involvement by Public and Private Sectors- Since 86% of land ownership in the south is private, success in conserving and restoring longleaf ecosystems depends on it being an economically viable, socially acceptable, and otherwise practical option for private and public land stewards alike. In addition to more traditional conservation partners, success requires that ALRI actively engage important private land-use communities and businesses (*e.g.*, agriculture, timber products, home builders associations, *etc.*), as well as local, state, and federal governmental organizations that represent a comprehensive cross-section of land-use interests.

Partnerships and Collaboration- A successful Initiative requires ongoing cooperation, collaboration, and a perspective that is firmly focused on longleaf conservation at the range-wide scale. The Initiative does not attempt to start anew but builds on the work previously initiated by other landscape-based partnerships. It will integrate its actions and align them with the goals and objectives of other existing plans, initiatives, and efforts including Joint Venture Implementation Plans, State Wildlife Action Plans, Endangered Species Recovery Plans, National Forest and Wildlife Refuge Management Plans, Northern Bobwhite Conservation Initiative, Partners for Amphibian and Reptile Conservation as well as plans developed by international and national bird initiatives.

Conservation Plan as a Framework and Catalyst- The Conservation Plan provides a range-wide framework for longleaf ecosystem conservation, identifies the most significant strategic actions to conserve these systems, and serves as a catalyst to further conservation and restoration actions in a strategic and outcome-oriented fashion. The Conservation Plan does not intend to be prescriptive, but rather acknowledges that the true work of identifying and addressing specific conservation activities will occur through subsequent efforts, with as many stakeholders as possible working collaboratively under the umbrella of ALRI.

The Collective Vision

The vision of ALRI is to have functional, viable, longleaf pine ecosystems with the full spectrum of ecological, economic, and social values through a voluntary partnership of concerned, motivated organizations and individuals. Meeting this challenge requires the strategic coordination of conservation actions among many partners and sectors that influence land use, with the goal of ensuring long-term sustainability and resiliency of these systems, and their constituent biodiversity.

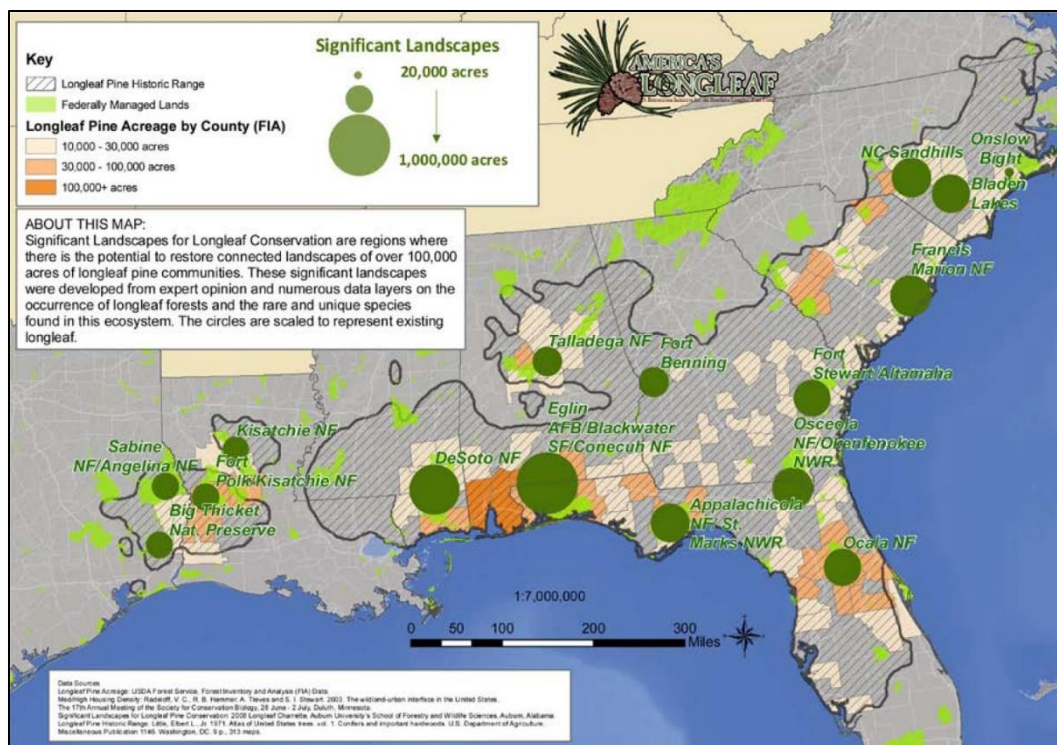
This shared Vision is an important component of the collaboration, providing clarity of purpose for those engaged.

Building a Conservation Plan

The Conservation Plan provided a unifying document and guide to accomplish the goals of ALRI. It was written for resource professionals representing organizations whose active participation was essential for further refining and ultimately delivering the recommendations of the Conservation Plan.

ALRI released their range-wide Conservation Plan in 2009, which set an overarching ambitious goal to double longleaf acreage from four to eight million acres by 2025, while improving the condition of existing longleaf ecosystems.

To help identify **the right places to work**, Significant Geographical Areas (SGAs) were created. The combination of the Conservation Plan and the Significant Geographic Areas were intended as a framework for a landscape level approach to the strategic, science-based conservation of longleaf pine ecosystems and their component species. A foundational premise was that, given limited resources, efforts should be prioritized in areas with aggregations of extant longleaf ecosystems of sufficient size, integrity, protected status, and connectivity potential to sustain functional landscapes and populations of target species into the future. A Focal Area technical team assembled the best data available at the time to delineate the SGAs. Forest Inventory Analysis data was an important regional database used to help understand existing longleaf.



Within the SGAs, sixteen draft “Significant Landscapes” were identified, and plans were outlined to review the rest of the longleaf range for “Significant Sites”, or smaller areas that were of importance because of representativeness, rare species assemblages, or other factors. Today, the Significant Landscapes are simply referred to as “SGAs”. A goal of the plan was that local collaborative groups would form in these landscapes to implement the conservation plan, which became what we now call Local Implementation Teams (LITs).

Based on the original 15-year Conservation Plan, Strategic Priorities and Actions blueprints are created every 3 years by assessing progress, new research and data, challenges, and opportunities. This review provides critical evaluation of existing work and allows for adjustment and communication of updated strategies and actions as needed for the partnership at large.

WORKING AT MULTIPLE SCALES

The **governance structure** (Appendix A) of ALRI takes on 3 different tiers which create the enabling conditions to carry out the work of the Conservation Plan. This model is working and has remained consistent through ALRI’s 10-year history.

Federal Coordinating Committee

In June 2010, the Departments of Agriculture, Defense, and Interior formalized their commitment to the America’s Longleaf Restoration Initiative and the goal of restoring 8 million acres in a Memorandum of Understanding (MOU). This landmark agreement also established the Federal Coordinating Committee (FCC), a committee to coordinate efforts among federal agencies to restore the longleaf pine ecosystem across nine Southern States. These Federal agencies are working with over 30 State agencies and nongovernmental organizations who have signed a Declaration of Partnership that commits each organization to being actively engaged in the restoration effort. The FCC meets at least twice a year. Each agency has a longleaf restoration focused top-down plan that aligns with the ALRI’s Conservation Plan. There is also a dedicated liaison from US Fish and Wildlife Service, USFS, Natural Resource Conservation Service, and Department of Defense who participate on the leadership team of the Longleaf Partnership Council. The commitment and collaboration by these agencies in this formal way provides a clear message of dedication that enables federal resources and policy to be mobilized to help achieve stated objectives of ALRI.

Longleaf Partnership Council

The Longleaf Partnership Council (LPC) was formed in October 2011. Its creation was a product of two prior meetings involving some 80 individuals representing diverse agencies and private groups. Recommendations from these early meetings framed the LPC, its operational guidelines and structure.

The LPC is comprised of 33 members representing non-governmental organizations, state and federal agencies, implementation teams and other collaborative efforts, private industry, universities/research/extension, and private landowners. Its purpose is to promote effective communication and collaboration among the large number of partners working to conserve longleaf pine ecosystems across the South. It provides a forum where the diverse partners can bring their different objectives, missions, responsibilities, and contributions required to make the conservation implementation efforts successful and demonstrate collective progress.

The LPC is governed by a chair, chair elect and past chair, with each serving a one-year term. This 3-part leadership model along with the consistent federal partners on the leadership team helps ensure continuity. The LPC typically meets face-to-face no less than twice providing a chance for comradery and productive side

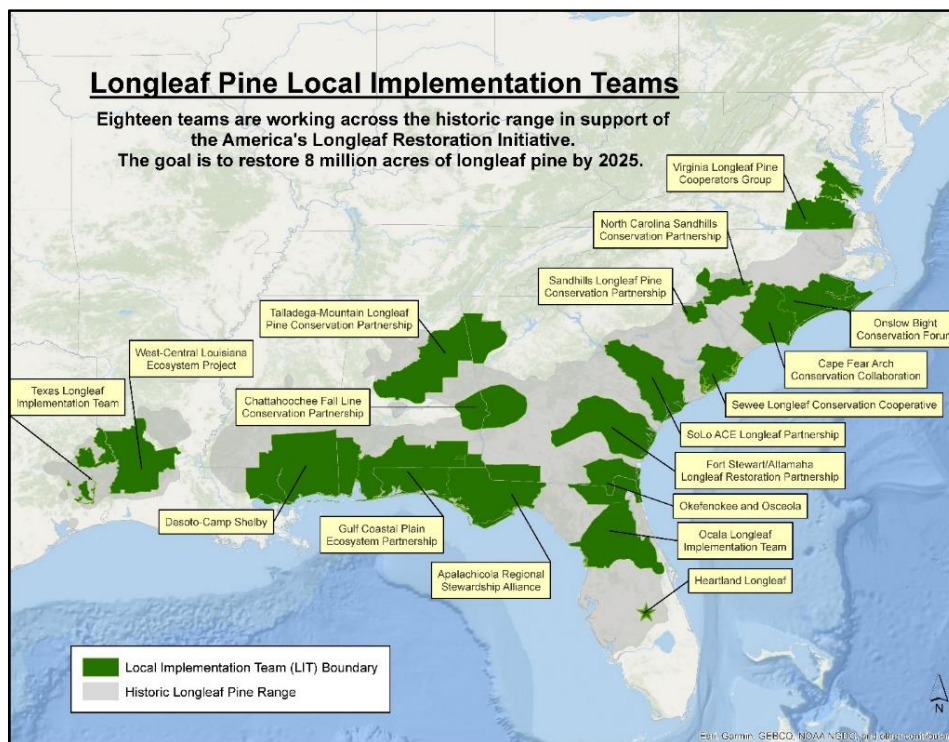
conversations. Due to COVID, quarterly virtual meetings via Zoom were established in 2020 affording more attendance and less travel expense but lacking personal connectivity. A hybrid model of meetings is being considered for the future.

There has been a consistent contracted facilitator who helps assemble agendas for each partnership meeting and guide discussion during the meetings. This important role has led to institutional continuity and continued momentum which are very important for success. There are also resources dedicated for a notetaker at each meeting. These details help make the meetings meaningful and productive. Productive meetings help maintain consistent attendance thereby maintaining consistent engagement by members. All are welcome at LPC meetings, but the council members have voting and decision authority. These open meetings allow transparency and engagement by multiple levels of ALRI partners. This transparency facilitates trust and trust leads to better work outputs.

ALRI meetings provide a platform for shared learning, planning, comradery, and recognizing achievements. There is a true collaborative sense where each partner feels valued and **shares in recognition of accomplishments**. The leadership of the LPC set this tone and models **working in the “right” way**.

Local Implementation Teams

Local Implementation Teams (LITs) comprised of partners and landowners interested in restoring and maintaining longleaf forests were assembled within SGAs to accomplish the work on the ground. Each LIT has a coordinator which is an essential ingredient to champion and maintain coordinated momentum. There are currently 18 official LITs which have individual conservation plans to prioritize actions on the ground and make best use of available resources. LIT partners use an adaptive management approach to periodically re-evaluate priority areas and update local conservation plans based on new opportunities. All LITs have the ability to apply for a dedicated pot of annual funding through the National Fish and Wildlife Foundation (NFWF) Longleaf Stewardship Fund. This **consistent funding is a key driver for continued and long-term success** of the partnership.



MEASURING SUCCESS

ALRI Annual Accomplishment Reporting

In order to measure success, ALRI has developed an annual approach to collecting metric data from LITs, states, and agency staff. This approach has been adapted over the years to improve accuracy and ease of assembly. The primary metrics for ALRI include Acres of:

- Longleaf Established (planted),
- improved longleaf through silvicultural practices,
- prescribed burning accomplished,
- longleaf protected via easements or acquisition.

Since inception, ALRI has achieved approximately:

- 1.7 million acres of longleaf pine planted
- 13.7 million acres of prescribed fire
- Over 270,000 acres protected
- Over 31,000 acres have been converted to longleaf dominance by silvicultural treatments such as midstory removal and harvest of offsite pine species
- In total, over 17 million acres have been impacted through the America's Longleaf Restoration Initiative

The current estimated acreage of longleaf pine forests is 4.7 million acres range-wide.

Although time consuming and complex, this annual assembly of metrics is incredibly important to help evaluate progress, steer future work, and provide accountability for resources dedicated to ALRI.

Nontraditional Metrics

While not measured as a unit of success for ALRI, there are other factors within ALRI that could be considered as metrics for a successful collaboration including:

- Different scales of work (local, statewide, regional)- By working at multiple scales, a collaborative can be more impactful.
- Number of engaged partner organizations- As of 2021 over 100 representatives and 55 organizations have served on the Longleaf Partnership Council, bringing diverse perspectives and expertise to the table that make ALRI a true collaborative effort.
- Number of partners/organizations with changed behavior through engagement in ALRI. Some examples include: USFS tracking longleaf restoration across forestlands and their commitment to increasing acreage (million-acre challenge), Resource Management Services taking extra

Economic measures through a Collaborative Forest Landscape Restoration (CFLR) Program analysis:

In 2010, the Osceola National Forest was one of 10 National Forests in 2010 to be awarded funding within the [Collaborative Forest Landscape Restoration Program](#). After 3 years of restoration work, a [study](#) was commissioned to examine the economic impact of the CFLR over 2010-2012. Within the Osceola area, the total economic output for all three years was over \$3 million including multiplier effects. Program expenditures also generated \$1.8 million in salaries and wages over the course of the three years within the same region of Florida and contributed \$459,000 in local, state and federal tax revenues. This study could be a model for future project evaluation and development of economic metrics.



steps to protect and manage longleaf through the Coastal Headwaters Project in partnership with the Conservation Fund, and Enviva partnering with the Longleaf Alliance and the LPC to reduce barriers for longleaf restoration by facilitating understory removal for private landowners.

Through NFWF grant reporting, there are also people metrics regularly assembled which include:

- Number of landowners with changed behavior (i.e. created forest management plan for longleaf, utilized a cost share program),
- Number of people reached (participated in educational meetings, trainings, or technical assistance),
- Number of people targeted (those landowners who receive mailings or are targeted through social media.)
- Number of jobs created

Potential future metrics could include factors tied to climate mitigation and our new subcommittee Longleaf For All (described below) including:

- Carbon storage of longleaf planted and grown over particular time period
- People/communities benefitted by wildfire reduction due to regular controlled burning
- People/communities benefitted by water quantity and/or quality benefits of a healthy longleaf managed forest.
- Minority and indigenous landowners supported by ALRI technical assistance or partnership collaboration.

ADAPTIVE MANAGEMENT

Understanding our Baseline

An important challenge for ALRI has been the lack of consistent range-wide data of existing longleaf forests and their condition. The historic range is immense and ongoing forestry practices change forest stand dynamics constantly. Without accurate data, it is difficult to understand baseline conditions and measure success at large scales. However, lack of data shouldn't paralyze a collaborative but inspire a method to collect it.

Forest Inventory Analysis (FIA) data was a key source of information during the inception of ALRI and continues to be a valuable and consistent resource. New tools and products have been developed since the beginning of ALRI to help better understand the landscape.

ALRI is already considering how best to integrate new data into the updated 15-year Conservation Plan which is to be written by 2025.

Connectivity at Scale

Another adaptive change that occurred as ALRI evolved included the development of an LIT Consul position. As LITs were forming in SGAs during the early phase of ALRI, there was recognition that there needed to be a champion to link the LITs to the Longleaf Partnership Council and to one another. This led to the creation of an LIT Consul position which a staff member of the Longleaf Alliance has held since 2015. This position facilitates best practices among LITs and communicates LPC guidance to LITs.

Longleaf For All

ALRI also recognized we have more learning to do to better incorporate underserved and diverse communities of people into our work. Therefore, in 2020 a subcommittee was created called Longleaf For All. The purpose of this

subgroup is to help the LPC build relationships, share information and resources, and provide guidance/recommendations on how the coalition can better serve and include minority and underserved landowners/operators and create positive change within the forestry and longleaf community. This effort will support the commitment to address past discrimination of minority farmers with recommendations to improve African American, Native American, and other minority farmers' access to federal, state, and local programs, and activities.

USFS AND SHARED STEWARDSHIP

USFS contributions to ALRI

The Forest Service manages four million acres within the historic longleaf range, approximately 850,000 acres are currently longleaf. Top-down support from the Forest Service has not only strengthened ALRI, but also created enabling conditions for USFS project staff to implement longleaf work. The Forest Service has two liaisons who facilitate work with private and other public landowners in the region. As project work has been completed, partnership trust and reliance has grown leading to additional innovative agreements and ideas (i.e., stewardship contracting, a prescribed fire mentor program, and engagement with Forest Plan revisions).

There is significant opportunity to expand longleaf habitat on National Forests. In response to Shared Stewardship and ALRI metric evaluation, the Forest Service established the "Million Acre Challenge" to put 1 million acres of National Forest System (NFS) lands on the path to longleaf restoration by 2025.

To work towards the goals of the Million Acre Challenge (MAC), the Forest Service developed a Southern Region Longleaf Pine Restoration Strategy for National Forests that identifies opportunities to improve the pace of longleaf pine restoration. This regional strategy provides a framework that was adapted into longleaf restoration strategies for each of the National Forests in the historic longleaf range. The USFS estimates that 78% of the MAC may be complete by 2022. The LPC hopes other federal and state agencies can adopt similar planning to incorporate additional longleaf restoration and management into their lands. USFS is setting an example in this way.

Wyden Agreements are cooperative agreements with willing partners and landowners for the protection, restoration and enhancement of fish and wildlife habitat and other resources on non-Forest Service lands. These have become a great resource for Fire Management Officers on National Forests to execute controlled burns across boundaries. Establishing a specific agreement with a landowner is very simple for the landowner and provides a service to enhance their property and reduce wildfire risk. USFS can often use a natural element as a fire line rather than cutting a new line.

Wyden Agreements on the Francis Marion National Forest

On the Francis Marion National Forest District Fire Management Officer, Paul Churchill, is a regular user of Wyden Agreements to facilitate fire operations across borders. Currently, Churchill has a total of 21 active Wyden agreements. A benefit of these agreements includes ongoing communications and engagement with neighboring landowners. Churchill often plans these agreements a year in advance to ensure paperwork is complete when burns are ready to implement.



Good Neighbor Authority (Appendix B) allows the USDA Forest Service to enter into agreements with state forestry agencies to do the critical management work to keep National Forests healthy and productive. This includes forest work that leads to longleaf planting and stand management.

Stewardship Agreements/Contracting (Appendix C) are another collaborative tool to engage non-federal and state partners like The Nature Conservancy and National Wild Turkey Federation to assist with and accelerate forest restoration on National Forests. Stewardship agreements/contracting helps achieve land management goals while meeting local and rural community needs, including contributing to the sustainability of rural communities and providing a continuing source of local income and employment.

CONCLUDING REMARKS

America's Longleaf Restoration Initiative is proud to be acknowledged as a model collaborative. There are many elements to creating and sustaining a successful partnership. In addition to the Guiding Principles for the achievement of the Conservation Plan, here are partnership elements important to ALRI:

- **Shared Vision**- Partners must understand and be invested in the agreed upon shared vision of the group.
- **Commitment and Focus of Partners**- Consistent and appropriate time and resource investment is needed to maintain momentum.
- **Working at different Scales**- Working on the ground and understanding those realities while planning and enabling the work at scale are important factors.
- **Organized collaboration**- Details matter. Make sure to enlist those that facilitate meetings, maintain records, and create conditions to ease participation by partners.
- **Measuring outcomes**- Collecting data and metrics accomplished are essential to: understanding if strategies and actions are working, telling the story, and raising more funds/resources.
- **Adaptive Management**- Reviewing measures and learning from successes and failures help the collaborative make necessary adjustments to accomplish the vision.
- **Sharing and celebrating success**- When successes are shared and celebrated across partners, this facilitates trust, kinship, and the enthusiasm by partners (and newcomers) to continue to engage.
- **Maintaining Champions** at different scales- It is important to have leaders who ensure momentum both on the ground (LIT Coordinators) and at scale (FCC and LPC leadership team).

These elements allow ALRI to work in the right places, at the right scale, and in the right way to achieve collaborative land management goals across boundaries. Several other collaboratives have modeled themselves after ALRI. Some examples include the Shortleaf Pine Initiative and the newly formed South Atlantic Salt Marsh Initiative.

Since America's Longleaf Restoration Initiative is a model for Shared Stewardship, it is recommended to create a Shared Stewardship agreement with ALRI the collaborative. Six of the nine states in the historic range of longleaf pine forests have signed Shared Stewardship agreements, but a broader agreement would solidify agency support into the future. This agreement could be tied to the new Conservation Plan for ALRI to be written by 2025 and an updated FCC MOU.

Appendix A

America's Longleaf Restoration Initiative Governance Structure

Federal Coordinating Committee



- National MOU signed in 2010 pledging support
- Members meet approximately twice annually

Longleaf Partnership Council

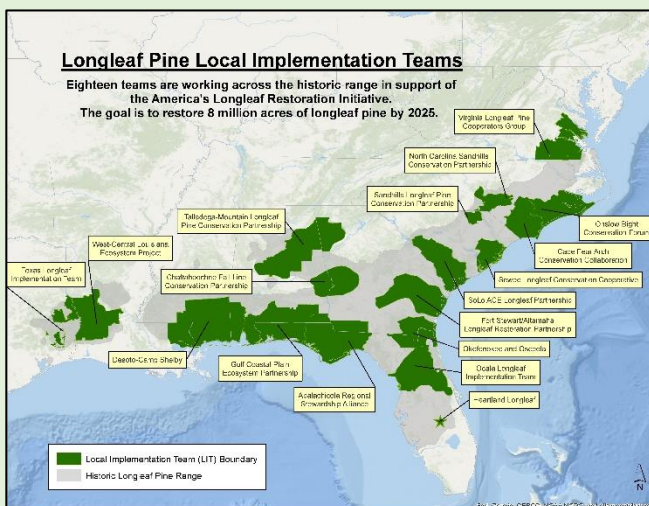


Members meet approximately 2-4 times per year.

Supported by a leadership team comprised of:

- Rotating Chair, Past Chair and Vice Chair
- Ongoing representation from Federal Partners
- Consistent resources and roles to help coordinate meetings and maintain files

Local Implementation Teams



18 Local Implementation Teams carry out collaborative work on the ground.

Each LIT has:

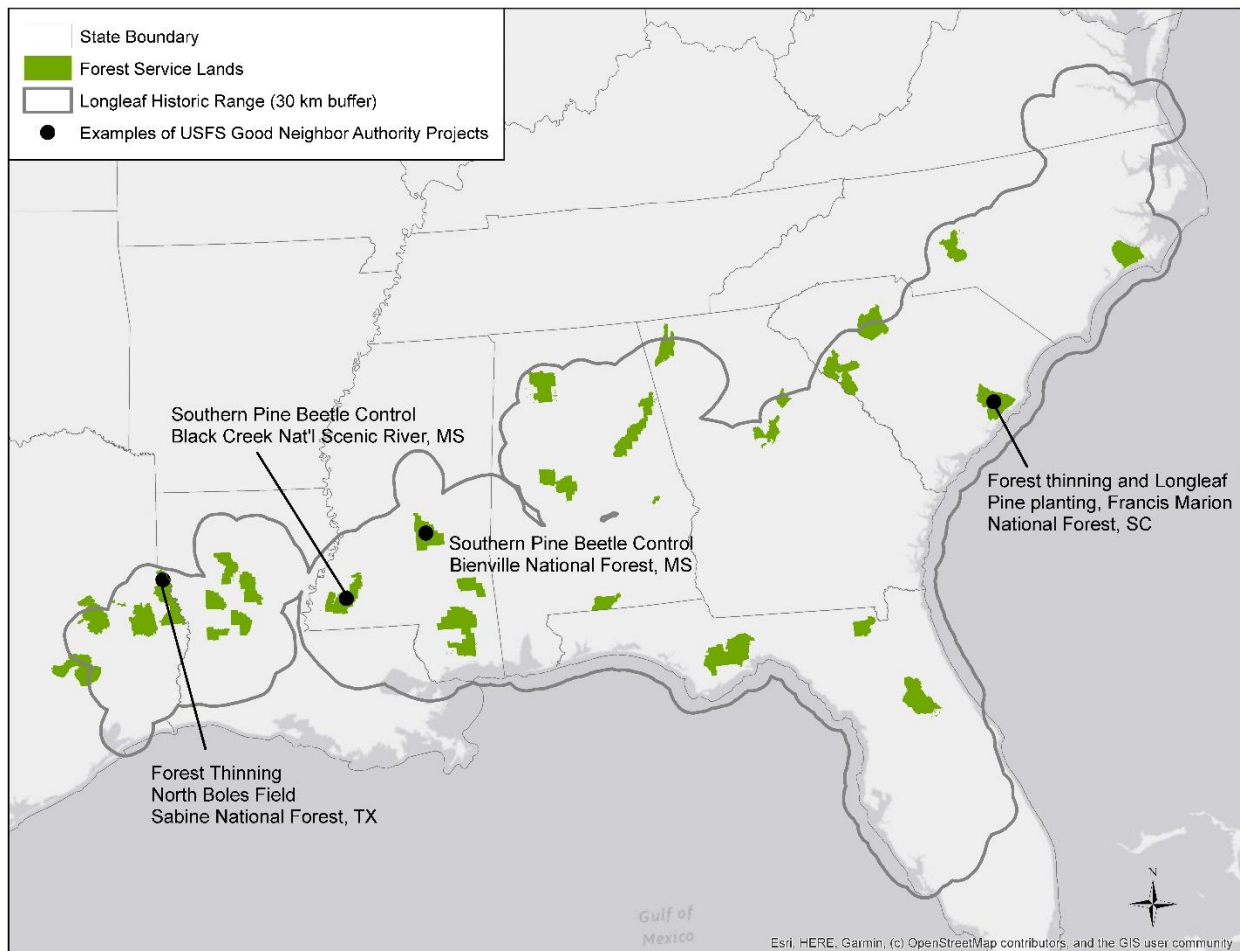
- A Coordinator
- Consistent funding opportunities thru the NWFF Longleaf Stewardship Fund
- A Conservation Plan

Appendix B

Good Neighbor Authority

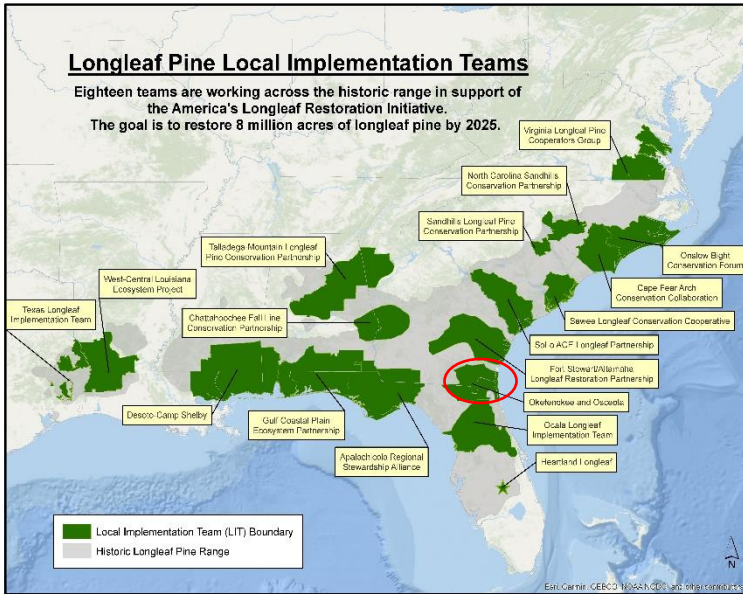
The Good Neighbor Authority (GNA) is a prime example of Shared Stewardship by facilitating state forestry agencies' engagement in beneficial forest management on USFS lands. The map below shows some examples of where GNA projects are located within the ALRI range. The work undertaken per GNA also aligns and supports the USFS million-acre challenge effort across National Forests in the longleaf range.

On the Francis Marion National Forest (FMNF) USFS staff are working with the SC Forestry Commission (SCFC). The SCFC have sold and are currently administering a timber sale that focuses on longleaf restoration. Through this authority, SCFC supplied the tree planting contractor and seedlings for more than 2 years to support longleaf restoration. SCFC planted 143 acres of longleaf on the Francis Marion in 2020 and 92 acres (61 acres of longleaf and 31 acres of shortleaf) in 2021. The FMNF is located within the [Sewee Longleaf Conservation Cooperative](#) LIT where partners discuss longleaf restoration within and outside of this National Forest.

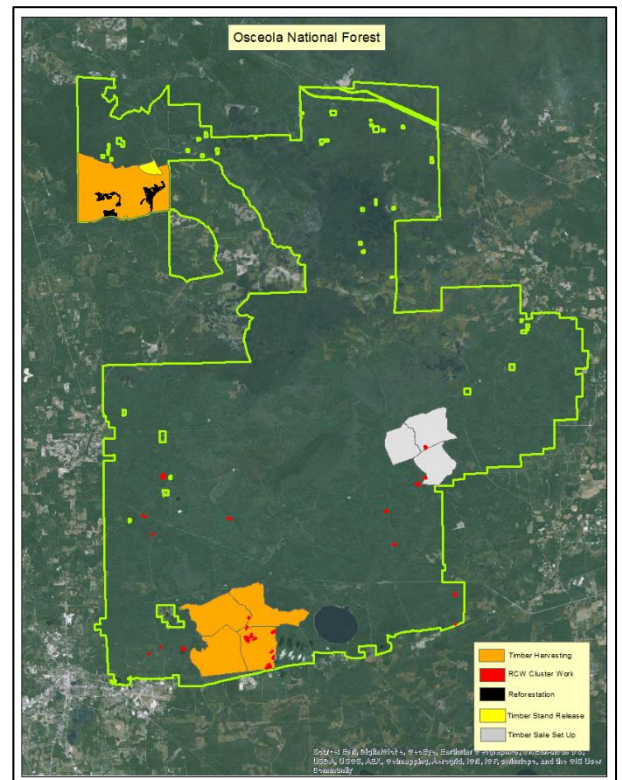
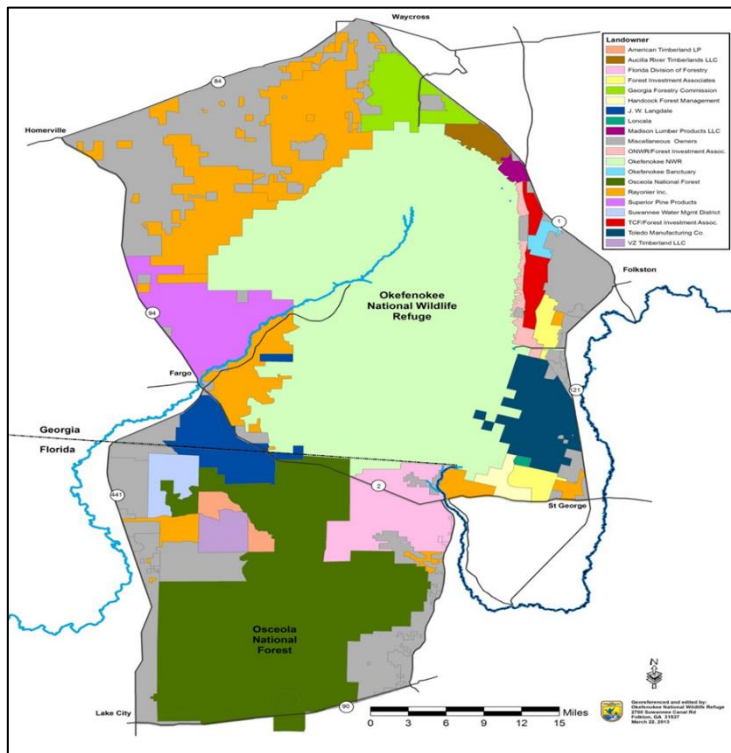


Appendix C

A Stewardship Agreement between TNC and the Osceola National Forest



The Osceola National Forest (ONF) is located within the Osceola-Okefenokee Local Implementation Team (O2LIT) where collaborative work occurs with surrounding landowners and partners. USFS staff at ONF along with partners have leveraged multiple tools and resources (Stewardship Agreements, CFLRP program, USDA Job Corps resources, and National Fish and Wildlife Longleaf Stewardship Funds) to enhance their land management work to meet desired future conditions, support local economy, and build jobs. Some accomplishments achieved to improve longleaf habitat include 4,846 acres of timber removal, 8,390 acres of mechanical fuel reduction, and 80 red-cockaded woodpecker artificial cavities inserted.



The Osceola NF and Okefenokee NWR conducted simultaneous longleaf stand planting projects in 2021 utilizing TNC staff to help plan and execute the seedling order, site preparation, and tree planting. This work occurred collaboratively via the TNC-Osceola Stewardship Agreement and O2LIT.

An example of some Stewardship Agreement tasks that The Nature Conservancy oversaw in partnership with USFS.