

# Chapter 2: The Planning Process



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This CCP and associated Environmental Assessment (EA) were prepared in compliance with the National Wildlife Refuge System Improvement Act of 1997, the National Environmental Policy Act of 1969, and Service policy set forth in the Departmental Manual on National Wildlife Refuge System Planning (part 602 FW 1).

## Meetings and Public Involvement

Public involvement is a key element of comprehensive conservation planning, and throughout this planning process we strive to provide as many opportunities for public participation as possible. A Notice of Intent to prepare a comprehensive conservation plan for Sherburne NWR was published in the Federal Register on May 4, 2001. Subsequently, articles in local newspapers notified citizens and a web page was developed. In addition, over 5,000 letters were sent to surrounding residents inviting them to participate. Seven public meetings were conducted between May 29, 2001, and September 13, 2002. Invitees and participants included members of the public, Ojibway and Dakota Tribes, Sherburne NWR Friends Group, Minnesota Department of Natural Resources, private conservation groups (NGOs), university faculty and government scientists. The planning effort benefited from the creative involvement of the public, tribal, state, university and federal participants.

Our planning process follows eight basic steps described in the Service's planning policy. The steps are:

- # Preplanning: Planning the Plan
- # Initiate Public Involvement and Scoping
- # Review Vision Statement and Goals and Determine Significant Issues
- # Develop and Analyze Alternatives, Including the Proposed Action
- # Prepare Draft Plan and NEPA Document
- # Prepare and Adopt Final Plan
- # Implement Plan, Monitor, and Evaluate
- # Review and Revise Plan

The CCP planning process began in November 2000 with a team comprised of Refuge staff, regional and Washington Office planners, representatives of regional office programs, and biologists from the U.S. Geological Survey, Biological Resources Division. The team agreed to proceed through a combination of expert technical groups and workshops open to the public and facilitated by Conservation Breeding Specialist Group (CBSG), which is a Species Survival Committee (SSC) member of the International Union for the Conservation of Nature (IUCN). Three technical groups (upland, wetland, and public use) met throughout the year. Concurrently, four CBSG workshops were held. These workshops were designed to incorporate the technical group findings and the public meetings and to consolidate work to produce a mission statement, vision statement, and goals and draft objectives for the environmental assessment and comprehensive conservation plan.

This CCP incorporates the results of these meetings and workshops. In addition to the general public, we invited individuals from a diversity of groups and institutions.

Table 1 and Table 2 specify public involvement efforts leading toward a public review draft.

**Table 1: Public Meetings**

Public Meetings	Date	Location	Participants	Results
Open House and Public Meeting	5/29/01	Sherburne NWR	22	Reviewed issues
Open House	5/30/01	Sherburne NWR		Reviewed issues.
CBSG Workshop I	7/16-18/01	St. Cloud	39	Refuge Vision, purpose, key issues, preliminary goals
CBSG Workshop 2	10/9-12/01	Otsego, Minn.	21	Refuge goals, alternative management scenarios and preliminary objectives
CBSG Workshop 3	3/12-15/02	Otsego, Minn.	27	Refined purpose, defined alternatives, developed objectives
CBSG Workshop 4	9/10-13/02	St. Cloud, Minn.	22	Finalized Alternatives and Objectives

**Table 2: Technical Work Groups and Focus Group Meetings**

Technical and Focus Group Meetings	Date	Location	Purpose
Sherburne NWR Staff Meeting	12/14-15/00	Sherburne NWR	Introduce staff to Comprehensive Conservation Planning and begin issue development.
CBSG Approach	6/6/01	Regional Office	First Organizing Meeting with CBSG
Upland Technical Group. USGS/BRD	6/27-29/01	Sherburne NWR	Begin Alternative and Objective setting for upland oak savanna.
Recreation Focus Group Meeting	8/15/01	Sherburne NWR	Issues development
Recreation Focus Group Meeting	8/27/01	Sherburne NWR	Review of CBSG meeting results and issues development

**Table 2: Technical Work Groups and Focus Group Meetings (Continued)**

Migratory Bird issues related to wetland management at Sherburne NWR	9/09/01 Conference Call	Murray Laubhan, Jim Mattsson, Steve Wilds, Tom Will, Bob Russell, and Steve Lewis.	The purpose of the call was to provide Murray with input from Regional Office biologists. The emphasis of the discussion was migratory birds, the conservation of which is the stated primary purpose of the Refuge.
Hunting Focus Group Meeting	9/20/2001	Sherburne NWR	Review hunting activities and identify issues.
Query Tool USGS/BRD	1/08/02	Regional Office	Review of the Decision Tools and matrix approach developed by Carl Korschgen, Kevin Kenow, and Jason Rohweder.
Ecosystem Planning The Nature Conservancy (TNC)	1/15/02	Sherburne NWR	Review of TNC designation of Sherburne NWR as a priority area, review of their ecosystem approach
Upland and Wetland Technical Group Meeting (USGS-BRD)	1/23-25/02.	Sherburne NWR	Completed Objectives for Alternative 5.
Public Use and Recreation Focus Group	2/09/02	Sherburne NWR	Issues development and public use/recreation alternatives discussed
Upland Technical Group USGS/BRD	2/15/02	Sherburne NWR	Completed objective development for Alternative 2
Query Tool Matrix Development USGS/BRD	3/4-5/02	Regional Office	Developed bird matrix for Sherburne NWR and mapped Alternatives
Query Tool Matrix USGS/BRD	7/17/02	Regional Office	Matrix development for breeding, brood rearing, and migratory waterfowl and wetland birds.
Wetland Technical Group (USGS/BRD, Gaylord Laboratory, TNC, MN DNR).	07/18-19/02	Sherburne NWR	Development of Biological objectives for Alternatives 2 and 4.
Public Use Technical Group (University of Minnesota and USGS/MN Cooperative Research Unit	08/29/02	Regional Office	Reviewed the public use survey results, discussed what additional work was needed.
Review of Alternatives and Objectives	8/09/02	Regional Office	Reviewed Objectives and clarified Alternatives 2 and 4.

## Issues and Critical Needs

The following is a consolidated list of issues and the resulting critical needs that were identified during many public meetings and technical group sessions during the course of the CCP process. The critical needs statement is meant to summarize and represent a group of related issues.

### Wildlife

- Critical Need:* To restore, conserve, and enhance wildlife populations that use the Refuge.
- Issue:* How do we expand management focus to ecosystem restoration without losing the original Refuge mission as outlined in the enabling legislation? When the Refuge began, management for ‘migratory birds’ focused on waterfowl, now the focus has expanded to include shorebirds, neotropical migrants, grassland birds, and endangered and threatened species.
- Issue:* Change in availability of neighboring croplands used as food by cranes.
- Issue:* Which declining species will benefit from oak savanna restoration?
- Issue:* Local species/gene pool reservoir may be lost by the Refuge’s isolation.
- Issue:* What is the definition of migratory birds in 2001 as opposed to 1965?
- Issue:* Local and regional concern about diminishing waterfowl populations.
- Issue:* Is the Refuge waterfowl monitoring program adequate?
- Issue:* We need more information about reptiles and amphibians on the Refuge.
- Issue:* We need to monitor human disturbance of wildlife on the Refuge.
- Issue:* Should we consider re-introduction of historic large mammals, especially elk and bison?

### Endangered and Threatened Species

- Critical Need:* To provide habitat for endangered and threatened species within the Refuge.
- Issue:* We need to consider conducting searches of the Refuge for federally listed and state-listed endangered and threatened species.
- Issue:* How do we manage Refuge land to conserve and restore threatened and endangered species, rare and declining species, and address regional priority species?
- Issue:* Why are Bald Eagles not expanding off the Refuge to surrounding habitats?
- Issue:* Should artificial nesting platforms be provided for Bald Eagles to supplement loss of trees?
- Issue:* *Issue:* Under what circumstances should we reintroduce rare, native species to the Refuge?

## Upland Management

- Critical Need:* To conserve and restore native plant communities, especially oak savanna on the edge of an expanding urban population.
- Issue:* Should we return the uplands to pre-1850's habitat quality?
- Issue:* Do we have the right burning prescriptions? Have we integrated the Cedar Creek prescribed burning research into our plans?
- Issue:* Is there a net loss of "snag" trees and natural cavities due to prescribed burning. What is the impact on Bald Eagle and cavity nesters?
- Issue:* Increased urbanization has resulted in a loss of surrounding cropland for cranes, ducks and geese.
- Issue:* Is oak wilt native to the region and should it be controlled?
- Issue:* We need to address a negative public perception about prescribed burning and conifer removal.
- Issue:* How do we get Regional resource dollars for oak savanna restoration when dollars are focused on species management.
- Issue:* What species should we concentrate on in Big Woods, forested wetlands, etc.?
- Issue:* What is the historic distribution and prevalence of aspen clones within Refuge uplands?
- Issue:* How do we deal with invasive species, both exotic and native, that are negatively impacting the natural ecological balance of Refuge habitats.
- Issue:* How do we control undesirable plant species (Norway pine, purple loosestrife, leafy spurge, Siberian elm, black locust, white spruce, box elder, scotch pine, jack pine, Colorado spruce, buckthorn).

## Wetland Management: Impoundments, River Valley, and Other Wetlands

- Critical Need:* To provide habitat for migrating waterfowl and other water birds that depend on the marshes and sedge meadows of this area.
- Critical Need:* To plan for a functioning watershed and wetland diversity within the altered St. Francis River valley.
- Issue:* Is the quality of the water entering the Refuge changing due to changing land use in surrounding areas?
- Issue:* Why was the St. Francis River valley historically considered prime waterfowl habitat?
- Issue:* What is the best strategy for managing impoundments for migratory water birds?
- Issue:* Should the Refuge maintain impoundments given the concept of restoration to pre-1800's conditions?
- Issue:* What is the impact of the impoundments on the historic flooding regime? Have they inadvertently caused a decline in the quality of natural river bottom wetlands?

- Issue:* What is the effect of impoundments on water levels and vegetation on nearby uplands?
- Issue:* Is carp control possible or desirable on managed and unmanaged impoundments?
- Issue:* Does the Refuge need further protection of water rights (minimum flow?)
- Issue:* What is the original ground water state in Anoka Sand Plain? Baseline study needed.
- Issue:* Need to monitor fish populations within the impoundments.
- Issue:* Is it possible to maintain a northern pike spawning run?

## **Landscape**

- Critical Need:* To establish partnerships and promote public awareness of the value of oak savanna and marsh habitat for the continuing benefit of wildlife.
- Issue:* How to deal with the fact that Sherburne NWR will be an island and must become its own buffer. Specifically, management of healthy wildlife populations while at the same time dealing with increasing expectations and pressures from the public.
- Issue:* How do we deal with the loss of connectivity between the Refuge and surrounding or nearby habitat?
- Issue:* How do we increase the “effective habitat size” of the Refuge? Should we expand the Refuge boundaries?
- Issue:* Increase in complaints from neighbors about wildlife damage.
- Issue:* How can we use the partners for Fish and Wildlife Programs and USDA, DNR and private programs to further Refuge goals?
- Issue:* Urbanization/adjacent land use places constraints on management tools and movement of wildlife and plants and their gene flow.
- Issue:* Working with local planning to engender sustainable ecosystem in face of human population growth, dispersion, use and politics.
- Issue:* The Refuge lacks contingency plans relative to urban encroachment, climate change, pollution, and funding uncertainties.

## **Promoting Wildlife-dependent Recreation**

- Critical Need:* To provide opportunities for wildlife-dependent recreation activities, particularly hunting and fishing, environmental education and environmental interpretation, wildlife observation and wildlife photography.

### **# Access and Legal Issues**

- Issue:* Trash dumping, vandalism of signs, snowmobile trespass and unleashed pets may increase on the Refuge.
- Issue:* The old schoolhouse is an inadequate space for special events, schools groups.
- Issue:* The spruce plantation on Blue Hill trail: to cut or not to cut.
- Issue:* Conflicts may occur between cross-country skiers and people on snowshoes on trails.

- Issue:* Providing public education on resource issues such as prescribed burning, tree removal and exotics.
- Issue:* Safety concern over high number of deer hunters during opening weekend of firearms season.
- Issue:* Refuge lacks appropriate visitor service infrastructure to accommodate large groups which limits environmental education opportunities.
- Issue:* Zoning of all uses, including environmental education and hunting, is not formalized and needs to be reviewed during CCP process.

#### # **General Comments/Issues**

- Issue:* What will be the impact of full use of road right-of-ways by the county and state?
- Issue:* Inviolate sanctuary versus public use: How much should be open and where?
- Issue:* Is there unequal access to the Refuge by hunters as opposed to people interested in other activities such as wildlife observation and photography?
- Issue:* Snowmobiles have access to county and state road right-of-ways. Can this be controlled within the Refuge boundaries?
- Issue:* What will the environmental impacts be of ATV access to state and county right-of-ways?
- Issue:* How do we deal with improper chemical application on road right-of-ways?
- Issue:* Does the Refuge have an adequate oil spill contingency plan for the underground pipeline?
- Issue:* We need to maintain a working relationship with the tribes.
- Issue:* Can we determine a carrying capacity for the number of people on the Refuge?
- Issue:* Recreation – Conflicted desires i.e., some people want more recreational use while others want less use of the Refuge.

#### # **Outreach**

- Issue:* Do we want to expand our outreach? Is a staff increase needed?

#### # **Environmental Education and Interpretation**

- Issue:* Are enough areas on the Refuge open for environmental education?
- Issue:* Need more environmental education in the context of expanded urban development.
- Issue:* The current focus is on schools, do we need new facilities to accommodate school groups?
- Issue:* Where should a possible new visitor center be located and what should it provide to the public?
- Issue:* How can we increase public understanding of the prescribed burning and conifer removal programs?
- Issue:* Space for indoor classrooms is needed to bridge the transition between the school room and the outdoors.
- Issue:* Teaching exhibits are needed with an area in front for kids to sit.

*Issue:* Marketing of the Refuge environmental education program is needed on an ongoing basis to get more teachers to “buy into” taking field trips to the Refuge and doing teacher-led activities.

*Issue:* Staff are needed for teaching students on the Refuge, for leading teacher in-service training sessions, and for doing ongoing marketing of the Refuge EE program.

*Issue:* An outdoor amphitheater is needed to provide a teaching area for large groups.

*Issue:* Funding from corporate sponsors is needed to assist schools with transportation costs for field trips to Refuge.

*Issue:* View of wetland, oak savanna, and prairie opening habitats are needed from an indoor facility to lead the students gradually into their field studies.

*Issue:* There is a need to establish the carrying capacity of the areas designated for environmental education to assure quality environmental education studies and minimal impact to habitat and wildlife. It is also important to establish the number of groups per day and the number of people in each group.

*Issue:* Oak savanna study sites are needed to provide locations for implementing the oak savanna curriculum.

*Issue:* Encourage the township park boards to fund and offer environmental education programs on the Refuge for township children.

*Issue:* Need to send introductory materials to teachers to entice them to come out to the Refuge.

*Issue:* There is a need for more trained volunteers to lead interpretive programs.

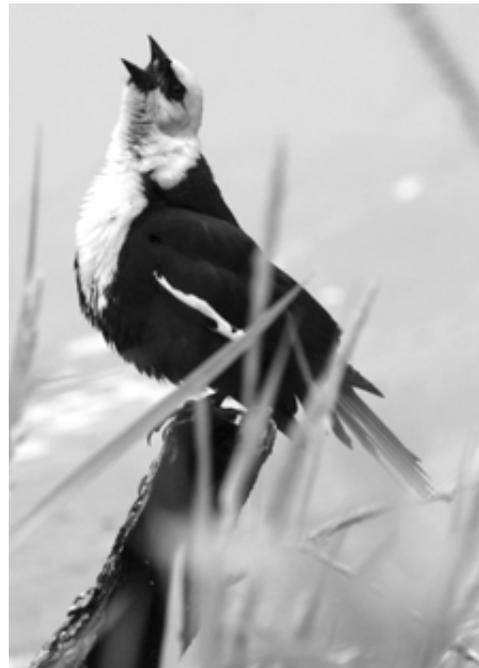
*Issue:* There is a need for Refuge-specific educational materials.

*Issue:* There is a need for display and storage space for books for sale, free brochures, etc.

*Issue:* Refuge management programs should be addressed through interpretation: prescribed burning, removal of non-native vegetation (pines), water level management, restoration to native oak savanna habitat, land use planning on private lands, cultural history, geologic history and land forms and how they shaped the present landscape.

*Issue:* Other potential themes include the National Wildlife Refuge System and how we are different from other natural resource agencies, environmental ethics and visitor etiquette.

*Issue:* Water management can be demonstrated through a video production or time series photography.



*Douglas Johannsen*

*Issue:* Environmental ethics can be demonstrated through placing a camera monitoring on an active eagle nest and letting visitors view the action from inside a visitor center.

*Issue:* Interpretive programs highlighting wildlife management and including resource issues on the Refuge can be offered to community organizations.

### # **Wildlife Observation and Photography**

*Issue:* There are too many people. Are restrictions needed for the number of vehicles on the tour route?

*Issue:* Does the observation drive optimize the viewing of wildlife? Should there be different drives for viewing wildlife and for scenic observation, such as flowers?

*Issue:* Are the observation decks useful? Are they in the right place?

*Issue:* People need training to see wildlife, how do we provide it?

*Issue:* Photography blinds are not being provided, should they be? Should people be able to use portable blinds?

*Issue:* The wildlife drive has too many signs, many of them are not informative.

*Issue:* Do we have adequate facilities for wildlife viewing such as observation decks, trails and auto tour routes?

*Issue:* Are there too many signs and leaflets on the Refuge?

*Issue:* People should feel like they've been in a pristine area, wild country; many say they feel that now.

*Issue:* Refuges should show management, and signs could be useful for this purpose.

*Issue:* Wildlife drive does not open until mid-April.

*Issue:* Increased visitation may reduce quality of personal experience by seeing others; perceived crowding.

*Issue:* Noise interference from other activities, e.g., hunting. Birding tours via motorcoaches (another example of noise interference).

*Issue:* Should we consider reintroduction of extirpated species as a viewing opportunity, e.g. Karner blue butterfly.

*Issue:* Fund raisers for Friends of Sherburne (e.g., bird-a-thon) to support more opportunities and action.

### # **Hunting and Fishing**

#### Firearms Deer Hunt

*Issue:* The antlerless deer quota does not agree with the DNR model. The scale of their model is too large for the size of our block.

*Issue:* This is the only hunt that is biologically justified.

*Issue:* Safety. Between 800 and 1000 hunters participate on the opening day of the firearms deer season. Safety among hunters and other users is perceived as a real or potential problem. The safety concern will also apply to other hunts.

*Issue:* Any future restriction on hunter numbers would be due to safety concerns. Quality of hunt is a bigger concern. The CCP should address the number on opening days.

- Issue:* Look to the future, increasing development promises problems with deer.
- Issue:* Are there ways to arrive at a more accurate deer herd size? (red oak cause a problem with aerial counts as well as pellet counts).
- Issue:* Should hunter registration for deer at the Refuge be mandatory? That would mean a commitment of staff for 9 days.
- Issue:* How can we manage a herd that moves on and off the Refuge?
- Issue:* Are there browse problems on the Refuge?
- Issue:* Should we allow a muzzle-loader season? A muzzleloader deer hunt would provide another deer hunting opportunity but may not be necessary from a population management standpoint. There are conflicts with the muzzle-loader season and other uses (example: cross country skiing).
- Issue:* Firearms season may limit access of waterfowl hunters (road to the boat landing is closed). In most years, this is not a concern as the water is frozen (but not every year).
- Issue:* Ethical versus non-ethical hunters. Examples: Leaving stands overnight, infringing on stands, etc. This is perceived as primarily a law enforcement issue.
- Issue:* Disruption of non-hunting visitor's quality of Refuge experience and safety perceptions. Some non-hunting visitors may be unaware that firearm hunters are in the field (no blaze orange required for non-hunters).

#### Archery Deer Hunt

- Issue:* Is archery hunt purely a recreational hunt and difficult to justify as population control? If so, why are bow hunters allowed greater access?
- Issue:* How do we address issue of injured deer? Are deer injury rates greater than during the firearms season?
- Issue:* Potential disturbance of migratory birds, such as roosting cranes, being pushed from preferred areas on the west side of the Refuge.
- Issue:* Consider closing the Refuge (especially the west side) once the gun season is over.

#### Other Hunting

- Issue:* Is the Refuge open too long for small game?
- Issue:* Prey base for predators may be negatively impacted by small game harvest.
- Issue:* Small game hunters and other recreational users can spoil an archer's hunt.
- Issue:* Disturbance to migratory birds, such as bowhunters walking on dikes in a closed waterfowl hunting area.
- Issue:* Potential Turkey Hunt: There is a conflict between the State spring hunt and other Refuge functions. There are also safety and zoning problems. A fall hunt may not conflict with other Refuge programs.
- Issue:* Consider a turkey hunt for hunters with disabilities.
- Issue:* All types of hunting access should be limited, not because of safety but because of the quality of the hunt.
- Issue:* Hunting during the early goose season may be viable on the Refuge if the over-water restriction is removed.

*Issue:* Disturbance of other migratory birds is a problem, especially along the river corridor.

*Issue:* Consider predator hunting and trapping consistent with state regulations.

### Fishing

*Issue:* Could over-fishing lead to a lack of fish for eagles?

*Issue:* Limited access for anglers with disabilities.

*Issue:* We need to deal with litter, tackle left at site, trampling vegetation, monofilament line, lead sinkers.

*Issue:* Is there a possible solution to control carp.

*Issue:* Do we need to expand access to the river?

*Issue:* Do we need interpretive panels at access points?

## **Preparation, Publishing, Finalization and Implementation of the CCP**

The Sherburne NWR CCP was prepared by a team consisting of Refuge and Regional Office staff. The CCP was published in two phases and in accordance with the National Environmental Policy Act (NEPA). The Draft Environmental Assessment, published as Appendix A in the Draft CCP, presented a range of alternatives for future management and identified the preferred alternative. The alternative that was selected has become the basis of the Final CCP. This document then, becomes the source for guiding management on the Refuge over the coming 15-year period. It will guide the development of more detailed step-down management plans for specific resource areas and it will underpin the annual budgeting process through submissions to the Refuge Operating Needs System (RONS) and Maintenance Management System (MMS). Most importantly, it lays out the general approach to managing habitat, wildlife, and people at Sherburne NWR that will direct day-to-day decision-making and actions.

The Draft CCP/EA was released for public review and comment on July 18, 2005. A Draft CCP/EA or a summary of the document was sent to more than 200 individuals, organizations, and local, state, and federal agencies and elected officials. An open house event was held on August 17, 2005, at the Refuge following release of the draft document. We received a total of 12 comment letters and e-mails during the 45-day review period. Appendix K of the CCP summarizes these comments and our responses. Several of the comments resulted in changes in the CCP.