

Meeting Workbook

Land Based Investment Strategy (LBIS): Forests for Tomorrow (FFT) Current Reforestation Planning and Delivery Workshop

Sponsored by

***Resource Practices Branch
BC Ministry of Forests, Lands and Natural Resource Operations***

Ministry of **Forests, Lands and
Natural Resource Operations**



Meeting Organizer:

Dave Cornwell, Land Based Investment Coordinator

Assembled by:

Terje Vold, Contractor, LBIS Project Support

September 12-13th, 2012

Richmond, British Columbia

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Agenda

Land Based Investment Strategy (LBIS): Forests for Tomorrow (FFT) Current Reforestation Planning and Delivery Workshop

Location: Vancouver Airport Marriott Hotel
7571 Westminster Highway, Richmond, BC

DAY ONE: WEDNESDAY, SEPTEMBER 12TH, 2012

LBIS: Strategic objectives, budgeting, sowing requests and mandatory reporting

8:30 am *Coffee/tea available – meet and greet*

9:00 am **Introductions and 5 Key Business Objectives - Lorne Bedford**

Opening remarks including an update on the Mid Term Timber Supply report and FFT flagship program

1. Develop budget for 2013/14 budget process under LBIS
2. Debrief the activities completed to date: lessons learned, successes shared
3. Confirm that sowing requests are based on established priorities, capacity to deliver, and consistent with budget forecast
4. RESULTS Data quality and planning, Backlog NSR
5. Share and learn from operational experiences through Case Studies

9:15 am **Session 1: Review budget numbers compiled to date – review strategic objectives - Al Powelson**

10:30 am *Coffee break*

10:45 am **Session 1: Complete session 1**

11:30 am **Session 2a: Debrief activities completed to date - Leith McKenzie and Mike Madill**

What went well, what was tricky, where can we improve, did we do it safely?

12:00 pm **Session 2b: Review critical issues identified - All**

12:30 pm *Lunch – will be provided*

1:30 pm **Session 3: Sowing requests – species selection and sowing levels - Al Powelson**

2:15 pm **Session 4: Type 4 Silviculture Planning - Ralph Winter**

3:00 pm *Coffee break*

3:15 pm **Session 5a: RESULTS Reporting, QA and planning - Caroline MacLeod**

3:45 pm **Session 5b: Backlog NSR - Matt LeRoy**

4:45pm **Recap of Day One**

5:00 pm **End of Day One**

	DAY TWO: THURSDAY, SEPTEMBER 13TH, 2012 LBIS: Delivery and training needs	
7:30 am	<i>Coffee/tea available</i>	
8:00 am	Housekeeping items from Day One on all topic areas	
8:15 am	Session 6: Wildfire Management Branch: Opportunities for collaboration - Kelly Osbourne	
9:15 am	Session 7: Site preparation techniques and equipment for stand rehabilitation projects - Janet Mitchell, FP Innovations	
10:00 am	<i>Coffee break</i>	
10:15 am	Session 8: Case study: Coastal regions – 5 year planning consultation process - Kevin Telfer	
11:00 am	Session 9: Case study: BCTS – Collaboration in delivery and lump sum sales - BCTS attendees	
12:00 pm	<i>Lunch – will be provided</i>	
1:00 pm	Session 10: Hand falling guidelines and owner obligations - Tom Jackson	
2:00 pm	Session 11: Forest Health - Jennifer Burleigh	
2:45 pm	Workshop wrap-up and evaluation Please complete the Workshop Evaluation Form before leaving	
3:00 pm	Adjourn	Thanks to All Who Participated!

Purpose of this Workbook

The purpose of this Workbook is:

- To provide a guiding framework for the workshop participants to address key objectives in support of the LBIS FFT Current Reforestation program
- To provide a reference material for those who are interested but could not attend the meeting as well as for meeting participants
- To set the scene for a meeting that is intended to be interactive, informative, practical and insightful.

This Workbook and the Workshop design was supported and preceded by Pre-Workshop Input sought from workshop invitees and others involved in the FFT Current Reforestation planning and delivery. This input is included in the Workbook as it helps inform various sessions of the meeting. Thanks to all who provided input!

Notes

Day One

Introductions and 5 Key Business Objectives

Welcome and Introductions

This initial session provides Lorne Bedford, Deputy Director, Resource Practices Branch with an opportunity to welcome participants to the workshop. Some have traveled a considerable distance to attend and everyone's participation is greatly appreciated. Although most people know most of the other participants at the meeting, there are participants who you may not know. It would be worthwhile therefore if participants could briefly introduce themselves in terms of their name and the organizational unit they work for. A list of meeting invitees is provided in Appendix A.

Agenda and 5 Key Business Objectives

The workshop agenda can be found on pages 3 and 4 of the Workshop Workbook. The 5 key meeting objectives are:

1. Develop budget for 2013/14 budget process under LBIS (see Session 1 in the Agenda)
2. Debrief the activities completed to date: lessons learned, successes shared (Session 2)
3. Confirm that sowing requests are based on established priorities, capacity to deliver, and consistent with budget forecast (Session 3)
4. RESULTS training (Session 5)
5. Share and learn from operational experiences through Case Studies (see Sessions 8 to 9 on Day 2), and about other related topics (i.e. Type 4 Silviculture Planning in Session 4; opportunities to collaborate with Wildfire Management Branch in Session 6; site preparation techniques in Session 7; hand falling guidelines in Session 10; and forest health in Session 11).

Following the last Session on Day 2 we will distribute a Workshop Evaluation Form (there is copy in Appendix B). Please complete this before leaving as we value your feedback so that future Workshops can better serve your needs. The Workshop will conclude on Day 2 no later than 3:00 pm so that you can make appropriate travel plans.

Thanks to those of you who shared your thoughts and insights as part of the Pre-Workshop Input; we have tried to capture this in the Workbook and Agenda with all of the unattributed input provided in Appendix C.

Capturing Workshop Discussions

We will be capturing the discussions at the Workshop in two ways:

- We will use flip charts to capture key discussion points
- We will be using a Livescribe Smart Pen to provide an audio recording solely for the purposes of assisting us in summarizing key Workshop discussions

A Workshop Synopsis will be prepared and distributed to all meeting participants and also shared with other others who could not attend but may be interested. Workshop presenters should send powerpoints and any other resource material (that is not already in this Workbook) to Dave Cornwell at Dave.Cornwell@gov.bc.ca so that it can either be included in the Synopsis or posted on the LBIS website.

Suggested Rules of the Road

- We commit to do everything we can to work together efficiently and effectively, and to make every effort to honour and respect the diversity of experience in the workshop.
- We will pledge in our discussions to:
 - help maximize participation by all participants
 - ensure that the focus remains on the task assigned
 - help the group accomplish each task in the allotted time

Mid Term Timber Supply Report and FFT Flagship Program

Lorne Bedford will provide an update on the report and FFT as a ‘flagship’ program.

LBIS Delivery Approach

By way of background the current draft of the LBIS Delivery Approach is provided in Appendix E; a clearer version can also be downloaded from the LBIS website at <http://lbis.forestpracticesbranch.com/LBIS/home>

Workshop Expectations

As part of the pre-workshop input request, the following was asked:

In addition to meeting the purposes of the Workshop, what expectations do you have for the workshop – as in “ <i>I would consider the Workshop a success if...</i> ”
--

The feedback included:

- | |
|---|
| <ul style="list-style-type: none">• Need to have a better understanding as to how the activities are linking back to meeting the LBIS objectives• An understanding as to the process in getting new innovative activities approved as eligible for funding• We know how to run the FFT program from start to finish with new staff.• Well, the agenda is already set. However, I would like more discussion on balancing of timber and non-timber values. Maybe this is appropriate discussion for another time. |
|---|

Session 1: Review Budget Numbers Compiled to Date and Strategic Objectives

The purpose of this session is to review the draft budget number proposed by regions as well as the strategic objectives of FFT Current Reforestation program. Al Powelson will lead the session. Background resource material includes:

- Key Dates for LBIS (Appendix D)
- LBIS Planning and Delivery Framework (Appendix E)
- Pre-Workshop Input (Appendix C) which is also highlighted below

FY 2013/14 budget development
<p>A key outcome of the Fall meeting is to develop the draft budget for 2013/14. Key dates for LBIS are provided at http://lbis.forestpracticesbranch.com/LBIS/node/246. The LBIS annual planning and delivery cycle is summarized on p. 4 of this Input Request document.</p> <p>Do you have any questions, issues or comments about the process and deadlines associated with the development of the FFT budget for 2013/14? If any issues, what could be done to help address those concerns? How could the LBIS budget process improve for FFT programs?</p>
<p>The key piece of information Regions and Districts need to know to develop a meaningful work plan is the Regional Sowing Caps. Preferably, the fall 2012 sowing requests caps, should be released prior to the meeting, Given that sowing caps drive our work plans an opportunity should be provided at this meeting to discuss the 2012 sowing cap assignments and the fall 2013 sowing caps</p>
<p>- Initial AOP estimate is part of the 5 year plan, however, there is no clear guidance in the timeline re: the more formal initiation of the AOP/budget development process which kick starts after the role up of the 5 year plan submission. Al's planning team doc suggests and AOP review by Districts by Dec. 15th which might suggest a formal submission to Branch by Dec. 31st (?). - issue of budget allocation decision making between LBIS categories and regions/districts still a concern. October set aside to seek input but the process needs clarification (Branch or Category leads to Regions (RMT)? - Budget process could be improved if performance (both goals and least cost achievement) was factored in (reward good performance).</p>
<ul style="list-style-type: none"> • Need to be clear that the 4-5 year plan drives the annual operational plan. • 5 year plan spread sheet confusing with the inclusion of 2012/13 and only extending 4 years out. • Need to better understand the timber supply current reforestation/ timber supply mitigation needs. 5 year plan goals need to be better linked to objectives. • Need a process for continually updating the recent wildfire history on an ongoing basis. • Need to a clear process for getting new innovative treatments approved for the current reforestation, timber supply mitigation investment categories
<p>Looks good to me, but then I have minimal direct involvement in the process itself.</p>

Session 2: Debrief Activities Completed to Date

The purpose of this session is to identify what went well, what was tricky, where we can improve, did we do it safely? The Session will be led by Leith McKenzie and Mike Madill. Below is the pre-workshop input on this topic (also in Appendix C):

Debrief activities completed to date
<p>What went well and why?</p> <p>What did not go well and why?</p> <p>What can we collectively do to improve FFT delivery?</p>
<p>While this is popular exercise, to improve the FFT program going forward we need to look at how program will be delivered going forward (in 2013/14) and use the what worked well exercise in the context of the 2012/13 program. So if our program is primarily be delivered by BCTS in 2013, we need to look at what worked well with BCTS delivery.</p>
<p>Use the above questions to explore any challenges or successes in engagement of, interaction with etc with other governmental agencies, for example BCTS, and the planning and sign off of ITSL's. Sharing of processes, and indication of challenges encountered and overcome???</p>
<p>What went well:</p> <ul style="list-style-type: none"> • Five year plan development went well, due to increased collaboration and engagement by forest tenure holders through the Coast Forest Management Leadership teams (FMLTS) • Fertilization delivery well coordinated and used a collaborative approach • Improved communication at the strategic planning stage (districts and tenure holders generally in agreement on plan direction) <p>What did not go so well:</p> <ul style="list-style-type: none"> • Delivery of some current reforestation and timber supply mitigation activities. Lack of resources at the district level, combined with FFT activities being often seen as lower priority activities when compared to other activities districts are tasked with delivering. • Very prescriptive investment criteria often lead to inability to locate suitable stands for treatment • Poor inventory information reduced efficacy of silviculture opportunity maps • Identification of timber supply issues. Lack of resources to fully dive into and explore mid-term timber supply issues / constraints etc. Timber supply assumptions often not being followed. Identification of activities often based on what licensees and districts would like to complete, rather than linked to a specific need. To improve this we would need to complete further timber supply analysis. Lack of second growth strategy to guide investment (harvest age, species profile etc). • Understanding who would be the delivery agent for FFT activities up front. Clarity around delivery agent needs to be identified at annual operational plan development stage • Some concern about TFL holders as third party delivery agents delivering activities on some other TFL <p>What can we do to improve delivery:</p> <ul style="list-style-type: none"> • Ensure that FFT planning/delivery is recognized in the service plan and regional work plans as a high priority activity

- Ensure adequate resources are allocated to deliver FFT activities at all levels including district resources to coordinate activities.
- Adopt the professional reliance model. Set clear objectives and let professionals develop the activities to meet those objectives. Very prescriptive investment criteria could perhaps be relaxed under a professional reliance model. Use monitoring as a way to determine if investments are being targeted towards achievement of identified objectives
- Allow more use of overhead funding to hire auxiliary staff
- Improve our timber supply assumptions, and monitor how well those timber supply assumptions are being followed. Adjust TSR assumptions where they are not being followed.

Program delivery transferred to BCTS

Branch perspective on district's continued involvement in program quite clear.

Confusion at local level (district & region) about the role the district would continue to play in the program (e.g. no admin allowance, fte allocation for LBIS unclear, planning and delivery of program)

Most things went really well. Implementation is now delivered via BCTS. This is new and there's a lot of learning. But, most is going smoothly.

Notes

Session 3: Sowing requests – species selections and sowing levels

The purpose of this session is to confirm that sowing requests are based on established priorities, capacity to deliver, and are consistent with the budget forecast. Al Powelson will lead the Session. Appendix F provide pages 6-8 from the Land Based Investment Strategy 2011/12 to 2013/14 as it relates to established strategic priorities for FFT. Appendix G provides FFT Species Management and Density Targets. Below is pre-workshop input on this topic:

Sowing Request
<p>Sowing requests need to be based on established priorities and capacity to deliver. The Land Based Investment Strategy 2011/12 to 2013/14 priorities for FFT current reforestation and timber supply mitigation are identified on pp. 6-8 in the Strategy document http://lbis.forestpracticesbranch.com/LBIS/home/LBIS</p> <p>FFT Guidance regarding the ‘Management of tree species composition’ with supporting ‘FFT species and density indicators and targets’ is provided at http://lbis.forestpracticesbranch.com/LBIS/node/103</p> <p>With the above background, what issues if any come to mind when developing sowing requests for your area? What other guidance (if any) do you feel would be useful?</p>
<p>See Sowing Cap comments.</p> <p>As far as influencing the % species sown for FFT funded areas, the first step branch needs to take is to identify who is submitting/entering and approving FFT sowing requests. Regional staff neither submit, enter, or approve FFT sowing requests, yet most of the correspondence about sowing request species composition is direct to Regional FFT staff. Branch needs to know who is submitting FFT requests. This meeting could be used by Branch to learn who is submitting FFT funded requests.</p>
<p>Suggest species targets should be guided by management unit (landscape level) species strategy.</p> <p>Species selection and sowing requests should consider (be guided by) the management unit forest health strategy that identifies forest health risks.</p> <p>FFT should be seen as a leader in promoting assisted migration of species due to climate change.</p>
<p>Being able to get seedlings for summer planting. Some of us only have a summer plant. Enough said.</p>

Notes

Session 4: Type 4 Silviculture Planning

The purpose of this session is to learn about the Type 4 Silviculture Planning initiative. Ralph Winter will lead this Session.

Notes

Session 5a: RESULTS Reporting, QA and Planning

The purpose of this session is provide RESULTS training so that the mandatory reporting requirements can be fulfilled. Caroline MacLeod will lead the Session. Below are some pre-meeting input comments on this topic (also in Appendix C):

RESULTS
A key outcome of the meeting is to ensure that RESULTS reporting is consistent with the key dates for LBIS (see website referenced in #1 above) and meets quality standards that have been established.
What obstacles, if any, do you face to ensure quality and timely entry into RESULTS? How can we best overcome those obstacles?
Wildfire polygons not always spatially noted in RESULTS
We are currently going through a number of staff. The district will need to have the new staff in the office trained in the use of results, contract administration, planning etc.

Notes

Session 5b: Backlog NSR

The purpose of this session is describe the status of backlog NSR and needed steps to meeting government's commitment to eliminate the backlog. Matt LeRoy will lead this Session.

Notes

Day Two

Housekeeping – Addressing Concerns from Day One

The purpose of this timeslot is to address any outstanding concerns or topics raised in Day One regarding budgets for 2013/14 (from Sessions 1), the debrief of activities completed to date in 2012/13 (from Session 2), sowing requests (from Session 3), Type 4 Silviculture Planning (Session 4), RESULTS training (Session 4a), Backlog NSR (Session 4b), or other issues raised.

If time permits, it may also be worthwhile to quickly review the status of the actions that stemmed from the LBIS FFT Spring 2012 meeting (see Appendix H)

Notes

Session 6: Wildfire Management Branch: Opportunities for Collaboration

The purpose of this session is describe opportunities whereby the FFT Current Reforestation program and the Wildfire Management Branch can effectively collaborate. Kelly Osbourne will lead this Session.

Notes

Session 7: Site Preparation Techniques and Equipment

The purpose of this session is to describe site preparation techniques and equipment than can be used for stand rehabilitation projects. Janet Mitchell with FP Innovations will lead this Session.

Notes

Session 8: Case Study: Coastal Regions

The purpose of this session is to review 5 year consultation process undertaken in the Coastal regions. Kevin Telfer will lead the Session.

Notes

Session 9: Case Study: BCTS – Collaboration in Delivery

The purpose of this session is to discuss BC Timber Sales – collaboration in delivery and lump sum sales. BCTS attendees will lead the Session.

Notes

Session 10: Hand Falling Guidelines

The purpose of this session is to discuss the hand falling guidelines and owner obligations. Tom Jackson, Director, Resource Worker Safety will lead the Session. Tom provided the following resource material that has been included in Workbook:

- Hand Falling Guidelines (Appendix J)
- Safety Conditions (Appendix K)
- Sample ITT Package (Appendix L)
- Pre-Work Conference Checklist (Appendix M)

Notes

Session 11: Forest Health

The purpose of this Session is to learn about forest health topics of interest to the FFT Current Reforestation program. Jennifer Burleigh will lead this Session.

Notes

Workshop Wrap-Up and Evaluation

The purpose of this timeslot is to wrap-up discussions at the two-day workshop, to thank all who attended for their contributions, and to encourage everyone to complete the Workshop Evaluation Form.

Workshop Synopsis

As noted in the first session in Day One, a Workshop Synopsis that captures the highlights and action items stemming from the Workshop will be prepared and shared with all participants.

Workshop presenters should send powerpoints and any other resource material (that is not already in this Workbook) to Dave Cornwell at Dave.Cornwell@gov.bc.ca so that it can either be included in the Synopsis or posted on the LBIS website.

Workshop Evaluation

A short one-page form will be distributed (see Appendix B) where we ask that you provide us feedback on how well the five stated objectives for the meeting were met, as well as any other comments you wish to share about the workshop and how it was managed.

Thanks to all Workshop Participants!

Notes

Appendix A: List of Workshop Invitees

Name	Organization
Delee Anderson	Vanderhoof District
Paul Barolet	North Island – Central Coast District
Robert Barta	Cariboo-Chilcotin District
Lorne Bedford	Resource Practices Branch
Aaron Benterud	Coast Mountains District
Alex Bergen	Nadina District
Carolyn Beurskens	Mackenzie District
Rob Bowden	BC Timber Sales
Paul Braumberger	Chilliwack District
Donna Brochez	Nadina District
Glen Buhr	Skeena Stikine District
Jennifer Burleigh	Resource Practices Branch
Jeff Burrows	Prince George District
Scott Byron	BC Timber Sales Stuart-Nechako
Lauri Como	Quesnel District
Dave Cornwell	Resource Practices Branch
Jacques Corstanje	Coast Mountains District
Francesco Cortini	LBIS communications consulting support
Nola Daintith	Cariboo Region
Mike D'Aloia	Fort Nelson District
Sam Davis	Mackenzie District
John DeGagne	Vanderhoof District
Bill Dobbs	BC Timber Sales Stuart-Nechako
Larry Fielding	BC Timber Sales Prince George
Cindy Gibson	Cariboo-Chilcotin District
Dave Gill	BC Timber Sales Okanagan-Columbia
Neal Gooding	Fort St James District
Kevin Gustafson	Thompson Rivers District
Dave Hamilton	BC Timber Sales Strait of Georgia
Mark Hamm	Cariboo-Chilcotin District
Larry Hanlon	Kootenay/Boundary Region
Steve Hind	Kalum District
John Hopper	BC Timber Sales Kamloops
Kerri Howse	Cariboo - Chilcotin District
Susan Hoyles	Omineca Region
Elizabeth Hunt	Peace District
John Illes	Nadina District
Tom Jackson	Resource Worker Safety
Ljiljana Knezevic	Omineca Region
Darwyn Koch	BC Timber Sales Prince George
Lyn Konowalyk	Rocky Mountain District
Katherine Ladyman	Okanagan Shuswap District
Bill Laing	BC Timber Sales Nadina
Kevin Lavelle	Selkirk District
Matt LeRoy	Resource Practices Branch
Monty Locke	Resource Practices Branch

Heather MacLennan	Thompson Rivers District
Caroline MacLeod	Resource Practices Branch
Mike Madill	Thompson/Okanagan Region
Lee Martens	Alberta Environment and Sustainable Resource Development
Rob Martin	BC Timber Sales Strait of Georgia
David McArthur	100 Mile House District
John McClarnon	Resource Practices Branch
Leith McKenzie	Thompson/Okanagan Region
Ted McRae	Okanagan Shuswap District
Janet Mitchell	FP Innovations
Anna Monetta	Omineca Region
Ed Nedokus	Cascades District
Guy Newsome	BC Timber Sales Cariboo-Chilcotin
Bill Olsen	100 Mile House District
Brent Olsen	Thompson Rivers District
Kelly Osbourne	Wildfire Management Branch
Michael Pelchat	Quesnel District
Bernie Peschke	Thompson/Okanagan Region
Ann Peter	Chilliwack District
Jennifer Plummer	Skeena Stikine District
Carl Pollard	Fort St James District
Brad Powell	Quesnel District
Allan Powelson	Resource Practices Branch
Gilbert Richir	South Island District
Calvin Ross	South Island District
Enrique Sanchez	Chilliwack District
Katrina Sigloch	Thompson Rivers District
Carolyn Stevens	Nadina District
Peter Stroes	Cascades District
Norma Stromberg-Jones	Prince George District – McBride Field Office
Jack Sweeten	Chilliwack District
Andrew Tait	Fort St James District
Kevin Telfer	Coast Region
Miodrag Tkalec	Mackenzie District
Ron Van der Zwan	Thompson Rivers District
Mary Visslai-Beale	Fort Nelson District
Terje Vold	LBIS project consulting support
Barb Wadey	Selkirk District
David Weaver	Resource Practices Branch
Craig Wickland	Coast Region
George Williamson	100 Mile House
Ralph Winter	Resource Practices Branch

Appendix B: Workshop Evaluation Form

How well do you feel the objectives of the Workshop were addressed? Were you satisfied with Workshop logistics? Please put an **X** in the column that best reflects your views

Workshop Objectives	Not met	Partially Met	Met	Exceeded
1. Develop budget for 2013/14 budget process under LBIS (Session 1)				
2. Debrief the activities completed to date: lessons learned, successes shared (Session 2)				
3. Confirm sowing requests are based on established priorities, capacity to delivery, and consistent with budget forecast (Session 3)				
4. RESULTS training (Session 5)				
5. Share and learn from operational experiences through Case Studies (see Session 8 and 9), and other related topics (Sessions 4, 6, 7, 10 and 11)				
Any Comments on Particular Sessions? (please identify with #1, 2, etc)				

Workshop Logistics If not satisfied, your comments to improve most appreciated	Satisfied	Not Satisfied	Comment
Workshop organization			
Workshop venue (meeting room, refreshments/lunch)			
Workshop agenda			
Other (please specify)			

Appendix C: Pre-Workshop Input

1. FY 2013/14 budget development

A key outcome of the Fall meeting is to develop the draft budget for 2013/14. Key dates for LBIS are provided at <http://lbis.forestpracticesbranch.com/LBIS/node/246>. The LBIS annual planning and delivery cycle is summarized on p. 4 of this Input Request document.

Do you have any questions, issues or comments about the process and deadlines associated with the development of the FFT budget for 2013/14?

If any issues, what could be done to help address those concerns?

How could the LBIS budget process improve for FFT programs?

A. The key piece of information Regions and Districts need to know to develop a meaningful work plan is the Regional Sowing Caps.

Preferably, the fall 2012 sowing requests caps, should be released prior to the meeting. Given that sowing caps drive our work plans an opportunity should be provided at this meeting to discuss the 2012 sowing cap assignments and the fall 2013 sowing caps

B. - Initial AOP estimate is part of the 5 year plan, however, there is no clear guidance in the timeline re: the more formal initiation of the AOP/budget development process which kick starts after the roll up of the 5 year plan submission. Al's planning team doc suggests an AOP review by Districts by Dec. 15th which might suggest a formal submission to Branch by Dec. 31st (?).

- issue of budget allocation decision making between LBIS categories and regions/districts still a concern. October set aside to seek input but the process needs clarification (Branch or Category leads to Regions (RMT)?

- Budget process could be improved if performance (both goals and least cost achievement) was factored in (reward good performance).

D.

- Need to be clear that the 4-5 year plan drives the annual operational plan.
- 5 year plan spread sheet confusing with the inclusion of 2012/13 and only extending 4 years out.
- Need to better understand the timber supply current reforestation/ timber supply mitigation needs. 5 year plan goals need to be better linked to objectives.
- Need a process for continually updating the recent wildfire history on an ongoing basis.
- Need a clear process for getting new innovative treatments approved for the current reforestation, timber supply mitigation investment categories

G. Looks good to me, but then I have minimal direct involvement in the process itself.

2. Debrief activities completed to date

What went well and why?

What did not go well and why?

What can we collectively do to improve FFT delivery?

A. While this is popular exercise, to improve the FFT program going forward we need to look at how program will be delivered going forward (in 2013/14) and use the what worked well exercise in the context of the 2012/13 program. So if our program is primarily be delivered by BCTS in

2013, we need to look at what worked well with BCTS delivery.
C. Use the above questions to explore any challenges or successes in engagement of, interaction with etc with other governmental agencies, for example BCTS, and the planning and sign off of ITSL's. Sharing of processes, and indication of challenges encountered and overcome???
<p>D.</p> <p>What went well:</p> <ul style="list-style-type: none"> • Five year plan development went well, due to increased collaboration and engagement by forest tenure holders through the Coast Forest Management Leadership teams (FMLTS) • Fertilization delivery well coordinated and used a collaborative approach • Improved communication at the strategic planning stage (districts and tenure holders generally in agreement on plan direction) <p>What did not go so well:</p> <ul style="list-style-type: none"> • Delivery of some current reforestation and timber supply mitigation activities. Lack of resources at the district level, combined with FFT activities being often seen as lower priority activities when compared to other activities districts are tasked with delivering. • Very prescriptive investment criteria often lead to inability to locate suitable stands for treatment • Poor inventory information reduced efficacy of silviculture opportunity maps • Identification of timber supply issues. Lack of resources to fully dive into and explore mid-term timber supply issues / constraints etc. Timber supply assumptions often not being followed. Identification of activities often based on what licensees and districts would like to complete, rather than linked to a specific need. To improve this we would need to complete further timber supply analysis. Lack of second growth strategy to guide investment (harvest age, species profile etc). • Understanding who would be the delivery agent for FFT activities up front. Clarity around delivery agent needs to be identified at annual operational plan development stage • Some concern about TFL holders as third party delivery agents delivering activities on some other TFL <p>What can we do to improve delivery:</p> <ul style="list-style-type: none"> • Ensure that FFT planning/delivery is recognized in the service plan and regional work plans as a high priority activity • Ensure adequate resources are allocated to deliver FFT activities at all levels including district resources to coordinate activities. • Adopt the professional reliance model. Set clear objectives and let professionals develop the activities to meet those objectives. Very prescriptive investment criteria could perhaps be relaxed under a professional reliance model. Use monitoring as a way to determine if investments are being targeted towards achievement of identified objectives • Allow more use of overhead funding to hire auxiliary staff • Improve our timber supply assumptions, and monitor how well those timber supply assumptions are being followed. Adjust TSR assumptions where they are not being followed.
<p>E. Program delivery transferred to BCTS</p> <p>Branch perspective on district's continued involvement in program quite clear.</p> <p>Confusion at local level (district & region) about the role the district would continue to play in the program (e.g. no admin allowance, fte allocation for LBIS unclear, planning and delivery of</p>

program)
G. Most things went really well. Implementation is now delivered via BCTS. This is new and there's a lot of learning. But, most is going smoothly.

3. Sowing Request
<p>Sowing requests need to be based on established priorities and capacity to deliver. The Land Based Investment Strategy 2011/12 to 2013/14 priorities for FFT current reforestation and timber supply mitigation are identified on pp. 6-7 in the Strategy document http://lbis.forestpracticesbranch.com/LBIS/home/LBIS</p> <p>FFT Guidance regarding the 'Management of tree species composition' with supporting 'FFT species and density indicators and targets' is provided at http://lbis.forestpracticesbranch.com/LBIS/node/103</p> <p>With the above background, what issues if any come to mind when developing sowing requests for your area? What other guidance (if any) do you feel would be useful?</p>
<p>A. See Sowing Cap comments.</p> <p>As far as influencing the % species sown for FFT funded areas, the first step branch needs to take is to identify who is submitting/entering and approving FFT sowing requests. Regional staff neither submit, enter, or approve FFT sowing requests, yet most of the correspondence about sowing request species composition is direct to Regional FFT staff. Branch needs to know who is submitting FFT requests. This meeting could be used by Branch to learn who is submitting FFT funded requests.</p>
<p>D. Suggest species targets should be guided by management unit (landscape level) species strategy.</p> <p>Species selection and sowing requests should consider (be guided by) the management unit forest health strategy that identifies forest health risks.</p> <p>FFT should be seen as a leader in promoting assisted migration of species due to climate change.</p>
<p>F. Being able to get seedlings for summer planting. Some of us only have a summer plant. Enough said.</p>

4. RESULTS
<p>A key outcome of the meeting is to ensure that RESULTS reporting is consistent with the key dates for LBIS (see website referenced in #1 above) and meets quality standards that have been established.</p> <p>What obstacles, if any, do you face to ensure quality and timely entry into RESULTS? How can we best overcome those obstacles?</p>
<p>D. Wildfire polygons not always spatially noted in RESULTS</p>

F. We are currently going through a number of staff. The district will need to have the new staff in the office trained in the use of results, contract administration, planning etc.

5. Case Studies
5a. You would like to share: Please describe briefly a FFT project where you believe others can learn from the successes and/or challenges faced? (Any web links to documents if available would be useful)
D. Suggest a case study on the 5 year planning process undertaken for the coast area
G. Maybe next year when we've experienced planting implementation in dead, burned mature stands.
5b. You would like to know about: Please describe an issue or challenge where a case study description would be useful for you to know about?
<p>B.</p> <ul style="list-style-type: none"> - I think a presentation of the Type IV investment strategy being conducted in Quesnel and elsewhere would be beneficial to the group. Especially learning's/early opportunities that other Districts further along in the queue could engage in or prep themselves for. - Although not particularly a case study, I think a presentation of the new, and soon to be released, Tree Species Selection Tool would benefit the group (contacts: Shirley Mah and Kevin Astridge). - Similar to the above. I think Al Powelson could talk to his FFT Planning Teams guidance doc. Would allow for additional clarity and discussion by all the District staff present that would be on point.
<p>C. My idea is to explore why we don't have the engagement levels from some District and BCTS TSO's. Are there some Districts that can outline how they worked co-operatively with BCTS offices to deliver a program. Not to be confrontational, but to share processes and successes???? I know Kamloops is a big success and whereas Babine and Stuart Nechako have been challenges.</p>
<p>D. Opportunities to complete stand conversion using innovate timber sale licenses (examples are poorly stocked stands on good sites, or stand with offsite species)</p> <p>Opportunities to use LBIS funding to assess previously spaced stands for development of attributes suitable for certain wildlife species. There have been a couple of proposals to complete spacing treatments to generate northern goshawk habitat thus making mature wood available for harvest. To do this we need to know if we can in fact use some type of spacing treatment to generate goshawk habitat sooner thus using younger second growth to meet habitat requirements making mature wood available.</p>
<p>G. As above. Would like some discussion on balance between site preparation in burned forest areas, and maintaining structural attributes for biodiversity. Also, interested in potential double impact of wildfire, then site preparation for planting. I'm not sure these areas shouldn't be left alone to regenerate naturally over-time. There may be more value for them to be left rather than bull-dozed.</p>

6. Communication: Project photos or short videos

Photos or short videos that represent various FFT activities and accomplishments that staff have made would be useful to share as they can improve FFT communications and our ability to maintain and improve the program.

Please share any photos or short videos you may have with a short description of project (e.g. where in BC; what is activity; who was involved; date; key accomplishment) provided below.

(no feedback so far)

7. Other

Any other comments or ideas you would like to share? For example, in addition to meeting the purposes of the Workshop, what expectations do you have for the workshop – as in “*I would consider the Workshop a success if...*”

D. Need to have a better understanding as to how the activities are linking back to meeting the LBIS objectives

An understanding as to the process in getting new innovative activities approved as eligible for funding

F. We know how to run the fft program from start to finish with new staff.

G. Well, the agenda is already set. However, I would like more discussion on balancing of timber and non-timber values. Maybe this is appropriate discussion for another time.

Appendix D: Key Dates for LBIS

<http://lbis.forestpracticesbranch.com/LBIS/node/246>

April	Submit Quality Assurance plans for activities where QA requirements are not covered in the standard. Submit Safety Plan Receive DM signed Road Use Exemption Letters for non-status roads and Road Use Permits from Road Permit holders. Submit PINES / RESULTS projects for spring field activities
Reminder April – November	Regional FLNR staff conduct periodic field audits
May	Spatial checks against encumbrances that must be completed to ensure that planned activities have no conflicts (or conflicts are resolved) with Forest Tenures (TFL), Range rights, Research plots, Trap Lines, Ungulate Winter Range, Private land, Oil, gas, and mineral rights, Approved Cutblocks, Pending Cutblocks, and Approved Cutting Permits.
June 1	Begin planning process for development of next fiscal LBIS. Canvass FLNR executive on goals, objectives and strategic priorities (including scope). Conduct on-line query of stakeholders about this fiscal LBIS and suggestions for change or alteration for next fiscal LBIS.
Mid-May to late June	Manual brushing completed
Mid-June	Spring planting completed
Week of July 1st	Meet with Regional Resource Managers to begin regional and district engagement process where applicable.
July 1 st – August 31 st	Investment category leads begin development of draft outputs and targets for the next three years.
July 31	Completion reports submitted in PINES/RESULTS for the spring planting Submit a completed survey package to the Regional FFT Staff for interim field audit
August 15	Seedling requests for Coastal area
Mid-august – late September	Chemical brushing treatments completed
September	Provincial LBIS FFT meeting
September 15	Last day to have the full Investment Schedule funding at least Pending in PINES/RESULTS
September 12	Submit sowing request to Nursery Services for summer planting program
September 26	Provide draft activity outputs and targets for next fiscal to RPB
September 30	(i) call for quarterly report; (ii) summer planting completed
October 1 st – October 31 st	Seek Regional, District, First Nations, and stakeholder input into draft next fiscal LBIS.
October 10	Submit sowing request to Nursery Services for spring planting program
November 1 st	Submit draft next fiscal LBIS to FLNR executive for consideration in next fiscal service plan and budget discussions.
December 6	Last day to have the full Investment Schedule Committed in PINES/RESULTS ('submitted' projects acceptable if in approvable condition). Submit first draft of the next fiscal year's management unit budget to the Regional FFT Staff
December - January	Provide Districts and Regions with a summary of planned outputs and targets for the next fiscal year.
January	Update Regions and stakeholders on focus and draft budget of the next fiscal LBIS.
January – March 1 st	Investment Category Leads balance outputs and targets with draft budget.
February 28	Deadline for submitting projects for RESULTS quality assurance
March 1	Upcoming fiscals operational plan finalized
March 15	Last day to submit tendering summary to Regional FFT Staff Last day to submit request for early funding approval
March 26	Last day to complete works for all fiscal year projects Last day to have all completion reports Approved
March 31	Release next fiscal LBIS with budget. Final confirmation of Delivery Agents for Annual Operating Plan
March	Provincial LBIS FFT meeting

Appendix E: LBIS Planning and Delivery Framework

Land Based Investment Strategy:

Planning and Delivery Framework

April 2012

The Land Based Investment Strategy (LBIS) Planning and Delivery Framework describes the annual LBIS planning and delivery cycle and outlines roles and responsibilities.

This document has been prepared by the Corporate Initiatives Division (Strategic Initiatives Branch) in collaboration with the Resource Stewardship Division (Resource Practices Branch). It will be reviewed annually and updated as required.

Contact:

Resource Practices Branch:

[Allan Powelson](#), R.P.F.

P: 250-812-5054

LBIS FFT Current Reforestation Workshop Workbook September 2012

Context

The Land Based Investment Strategy (LBIS) was created in 2010 through consolidation of the former Ministry of Forests, Mines and Lands/Ministry of Natural Resource Operation's mix of land-based programs in order to ensure that limited funding will be expended in the most efficient and effective way. The consolidated programs and associated funding included: the Forest Investment Account – Land Based Investment program (FIA-LBIP); Forests for Tomorrow (FFT); invasive plants; and forest health.

In 2011, following the creation of the Ministry of Forests, Lands and Natural Resource Operations (MFLNRO), the LBIS was evaluated to consider:

- How the strategy's scope and suite of activities for 2012/13 and beyond could reflect government's priorities for the broader natural resource sector; and,
- How it could contribute to the achievement of the ministry's vision of "environmental sustainability and economic prosperity".

This framework reflects the recent evaluation of the LBIS and has been prepared to describe the annual LBIS planning and delivery cycle, and outline roles and responsibilities for staff involved with the strategy. This framework will be reviewed annually and updated as required.

LBIS Purpose

The purpose of the LBIS is to guide ongoing resource investments and short-term targeted investments in British Columbia's natural resources to realize environmental sustainability and economic prosperity.

LBIS funding is a distinct vote under MFLNRO, and is managed by the ministry's Resource Practices Branch.

LBIS goals and guidance for planning land-based investments were developed by the ministry's Corporate Initiatives Division (Strategic Initiatives Branch) in collaboration with the Resource Stewardship Division (Resource Practices Branch).

Roles and Responsibilities are outlined in Appendix 1.

LBIS Goals

The goals of the LBIS are to:

- Actively manage a portfolio of natural resources to uphold and enhance their value.
- Mitigate impacts due to catastrophic environmental disturbance or human action.
- Act on immediate needs/emerging priorities to enable the use of B.C.'s natural resources and contribute to the achievement of economic, social and environmental benefits.

LBIS Scope

Eligible investment categories and priorities will be determined annually using the strategic direction from the following sources:

- The Ministry's service plan goals and objectives.
- Annual regional and provincial work plans that identify key priorities and projects.
- Other government commitments as described in the Throne Speech, Canada Starts Here: the BC Jobs Plan, specific initiatives, Minister's priorities, etc.

As well, some of the existing LBIS activities and projects may have long-term strategies that identify priority work to be completed over a number of years.

LBIS Investment Principles

- LBIS funding is for 'on the ground' activities that provide economic, environmental and social benefits to British Columbians.
- LBIS funding is for discretionary investments, beyond standard obligations of licensees/tenure holders.
- LBIS funding is not intended for activities that are part of the ministry's operational land management programs including those that do not have an 'on the ground' focus.
- Investment categories are determined each year based on LBIS goals, objectives, and strategic priorities. Funds will be allocated between and within investment categories considering the potential contribution to the goals, objectives and strategic priorities of the LBIS, relative to cost.
- Land based investment activities will be delivered using the method deemed most effective and efficient to achieve the LBIS goals and objectives.
- All investment category planning teams will seek additional external funding, where possible, to assist in achieving the LBIS goals and objectives.
- The planning and allocation process will be open and transparent.

LBIS Annual Planning and Delivery Cycle

An annual planning and delivery cycle has been prepared to explain the stages in the planning process and describe the key deliverables that will be produced as the LBIS is prepared each year.

See diagram Appendix 2.

Annual Allocation of LBIS Funding

The annual allocation of LBIS funding, including the budget for activities in each of the eligible investment categories, will be determined each year using the following steps:

- 1) An investment rationale will be developed for each eligible investment category based on LBIS goals, scope, investment principles, and priorities.

The investment rationale will describe:

- the issue(s) being addressed including the size and general area of impact within the province;
- the proposed activities, outputs, targets and budget needs (required to fully address the issue);
- how an investment would result in a significant contribution to achieving key government priorities;
- if applicable, how an investment would address a MFLNRO statutory responsibility;
- how much total funding would be required to resolve the issue;
- how long it would take to resolve the issue at the proposed funding level;
- the benefit(s) that could be achieved from an investment including: the types of benefits e.g., economic/job creation, social, environmental with quantifiable and qualitative information as available; and, how an investment would assist in the achievement of indicators or targets in other investment categories;
- whether there could be a significant risk or lost opportunity (social/safety, economic, environmental) if the activity was not completed in the next fiscal year; and,
- opportunities for partnering/leveraging funding.

- 2) The investment rationales will be evaluated by each of the investment category teams, using a criteria ranking tool, to assess how the proposed activities align with:

- key government priorities and statutory responsibilities;

- the benefits that can be derived from the activities (economic, environmental and social);
- return on investment;
- the opportunity for partnering/leveraging funding; and,
- the risk or loss of opportunity of not implementing the proposed activity.

The criteria ranking tool is based on the Priority Ranking tool used in MFLNRO's business planning process. Each evaluation criteria has a set of questions and associated points to help the reviewers assign a ranking score.

The total points for the evaluation of each investment rationale will be tallied and an average score will be calculated. A draft budget allocation across the investment categories will be determined taking into consideration the ranked average scores for each of the evaluated investment categories.

In order to capture input from a broad perspective, input on the evaluation of investment rationales and the draft budget allocation will be sought from across the ministry including provincial/branch and from each of the ministry regions.

Starting with the 2012/13 planning and delivery cycle, input to the budget determination process will be gathered via the ministry's Provincial Stewardship Leadership Team.

- 3) A draft recommended budget allocation will be presented to the ministry executive, for approval by the Deputy Minister.
- 4) The final annual budget for LBIS will be determined through the ministry's budget allocation process.

The criteria ranking tool is included in Appendix 3.

Reporting, Auditing and Evaluation of LBIS Achievements

An annual report will be produced to report on performance indicators and program accomplishments towards the achievement of LBIS goals.

Additional periodic reports e.g., quarterly reports, may be produced as required and/or directed in a format as specified.

Auditing/quality assurance will be carried out to ensure that funded activities are consistent with government standards as appropriate.

LBIS Communications and Engagement

A communications plan will be developed, reviewed and updated annually to determine what, how, and when to communicate to the public about LBIS.

As part of the communications plan, a website that includes current and relevant LBIS information will be maintained.

An engagement strategy will be developed to focus initially on how the LBIS is being refined for 2012/13. Stakeholders, communities and First Nations will be considered in developing the engagement strategy.

Appendix 1: Roles and Responsibilities

Deputy Minister

Responsible for:

- Approval of the Land Based Investment Strategy.

Assistant Deputy Minister -Resource Stewardship Division

Responsible for:

- Approval of the transfer of funds between eligible investment categories.

Resource Stewardship Division, Resource Practices Branch (RPB)

Responsible for:

- Develop, and update as required, a planning and delivery framework to facilitate: the determination of LBIS scope, goals, investment principles, eligible investment categories, and the investment allocation; reporting, auditing and evaluation of LBIS achievements; communication and engagement as required through the annual planning and delivery cycle.
- Supporting the annual planning and delivery cycle by:
 - Gathering and analyzing information to determine provincial priorities, and eligible investment categories;
 - Coordinating the development of investment rationales and outputs and targets for each eligible investment category;
 - Coordinating the annual funding allocation process;
 - Preparing LBIS updates to the rolling 3 year strategy;
 - Providing technical expertise and staff resources as required by the Corporate Initiatives Division;
 - Distributing communications materials and reports e.g., via internet or as determined in the LBIS framework;
 - Supporting engagement activities as required;
 - Overall coordination of investment category teams through the annual planning and delivery cycle e.g., managing the overall LBIS budget; managing activity standards; gathering and compiling input from category teams for the annual budget allocation process; gathering and compiling accomplishments for quarterly and annual reports; auditing and quality assurance on activities as required; annual program evaluation for continuous improvement.

Investment Category Leads

Responsible for:

- Supporting the annual planning and delivery cycle by:
 - Coordinating input from the specific category teams to develop and/or update, and evaluate (using the criteria ranking tool) investment rationales for the annual funding allocation process;
 - Participating in the determination of, and reporting on, outputs and targets specific to investment categories, required to achieve LBIS priorities, goals, and objectives;
 - Managing activity standards in collaboration with RPB;
 - Providing oversight for the delivery of category specific activities included in the LBIS e.g., coordinating First Nations information sharing;
 - Supporting communication and engagement activities as required; and,
 - Auditing/quality assurance to ensure that activities are consistent with government standards.

FLNRO Regional and District Staff

Responsible for:

- Supporting the annual planning and delivery cycle by:
 - Identifying strategic gaps and opportunities in the LBIS planning process;
 - Collaborating with investment category leads and RPB e.g., to recommend tactics needed to achieve LBIS goals, objectives, indicators and targets; and to identify priority treatment areas;
 - Balancing activity proposals to optimize achievement of regional/district indicators and targets in alignment with LBIS goals and priorities;
 - Collaborating with RPB in the development of (delivery allowance) cost caps;
 - Achieving LBIS outputs/targets within their respective region/district where they are directly responsible for delivery;
 - Communicating provincial, regional/district indicators, targets and tactics for LBIS and where applicable, supporting additional communication and engagement activities as required;
 - Where applicable, managing regionally held recipient agreements;
 - Where applicable, reviewing information sharing with First Nations undertaken by third parties (delivery agents) to ensure it is adequate for the LBIS project to proceed;

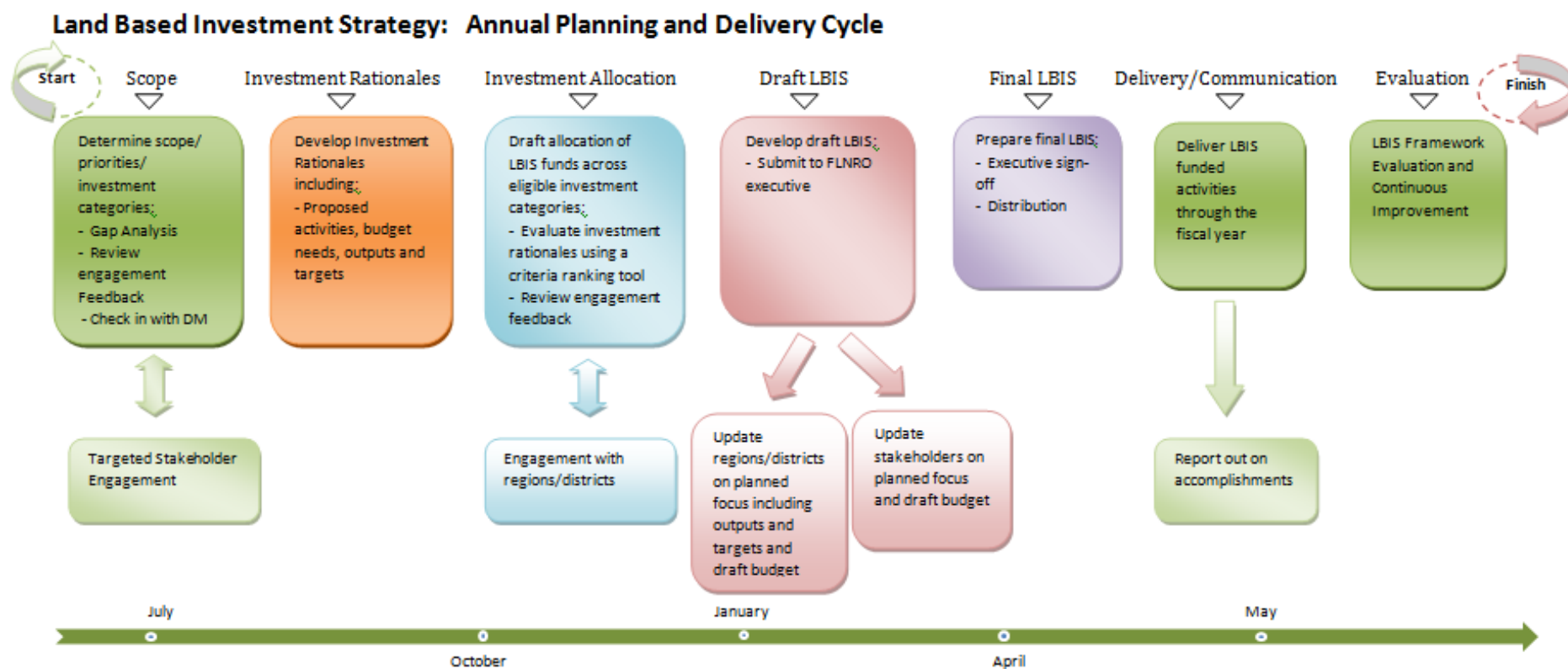
- Providing information about the achievement of LBIS outputs for preparation of annual (and other) reports and where applicable, ensuring timely entry of accomplishments into databases, e.g., RESULTS;
- Auditing/quality assurance to ensure that activities undertaken are consistent with government standards.
- Monitoring program implementation collaboratively with RPB and other staff. Reviews may be done on recipient agreement holders, contractors, districts, BCTS and industry work.

Provincial Stewardship Leadership Team

Responsible for:

- Supporting the annual planning and delivery cycle by:
 - Identifying strategic gaps and opportunities in the LBIS planning process;
 - Providing input to the LBIS budget determination process;
 - Providing input to the program evaluation process.

Appendix 2: LBIS Annual Planning and Delivery Cycle



Element	Deliverable	Timing (Annual)
Scope	Draft scope/priorities/eligible investment categories	early July
Investment Rationales	Investment rationales for each eligible investment category (including proposed activities, budget needs, outputs and targets)	Start mid-July; Submit late September
Investment Allocation	Draft allocation of LBIS funds across eligible investment categories	mid-October
Draft Strategy	First draft of next fiscal's LBIS	early November
Final Strategy	Final LBIS (signed by executive and approved for distribution)	end of March
Delivery	Delivery of LBIS funded activities	Through fiscal year
Reporting and Communication	Quarterly and Annual reports on LBIS accomplishments, outcomes, benefits	Quarterly; and end of September for Annual Report
Program/Framework Evaluation	Evaluation of outcomes, planning and delivery process against LBIS framework and targets	May

Appendix 3: LBIS Criteria Ranking Tool

LBIS Ranking Criteria		Description	Points
Key Government Priority	Is the activity a high profile priority of Cabinet or the Minister or a key objective of the ministry service plan?	MFLNRO and/or Government priority (e.g. supported by Minister or Cabinet announcement)	15
		MFLNRO priority (Deputy Minister/ADM direction) or has been identified as a regional priority	10
		Not a MFLNRO priority, however it has been identified as a regional or district or provincial priority by the investment category	3
		None of the above	0
Statutory Responsibility	Does the activity address a MFLNRO statutory responsibility? (does not include legal reforestation obligations)	Directly required to make statutory decisions or adhere to statutory requirements	10
		Indirectly required to make statutory decisions or adhere to statutory requirements	7
		Not required to make statutory decisions or adhere to statutory requirements	0
Scope of Benefit	Magnitude of the expected impact in addressing MFLNRO goals, objectives and strategic priorities	Provides provincially significant benefits in at least one category – social/safety, economic, environmental	15
		Provides regionally significant benefits in at least one category – social/safety, economic, environmental	10
		Provides locally significant benefits in at least one category – social/safety, economic, environmental	5
		No significant benefits	0
Multiple Benefits	What is the potential for the activity to provide positive benefits in more than one category (social/safety, economic, environmental)	Provides high or moderately significant benefits in all three categories (social/safety, economic, environmental)	10
		Provides high or moderately significant benefits in two categories (social/safety, economic, environmental)	5
Reliability of Benefits	Strength of evidence that the activity will result in the projected outcomes	High likelihood that outcomes will be realized	6
		Moderate likelihood that outcomes will be realized	4
		Low likelihood that outcomes will be realized	2
		No likelihood that outcomes will be realized	0
Risk/Opportunity/Urgency	If the activity is not completed this fiscal year, does it pose a significant risk or lost opportunity (social/safety, economic, environmental)?	Poses significant risk or loss of opportunity	9
		Poses moderate risk or loss of opportunity	6
		Poses low risk or loss of opportunity	3
		No risk or loss of opportunity	0
Job Creation	To what extent will the allocation of resources to this activity create employment opportunities?	Provincially significant long and short term employment	7
		Regionally significant long and short term employment	4
		Locally significant long and short term employment, or addresses government's objectives for Aboriginal job creation	2
		No or minimal long and short term employment	0
Return on Investment	To what extent will the allocation of resources to this activity create greater return on investment or benefit cost ratio?	Provincially significant social, safety, economic or environmental return on investment	9
		Regionally significant social, safety, economic or environmental return on investment	6
		Locally significant social, safety, economic or environmental return on investment	5
		No return on investment or minimal benefit	0
Partnering/Leveraging	To what extent will the allocation of resources to this activity attract the resources of other parties or organizations	Provincially significant partnership/leveraging	6
		Regionally significant partnership/leveraging	4
		Locally significant partnership/leveraging	2
		No likelihood of partnership/leveraging	0

Appendix F: LBIS Priorities for FFT

Forests, Lands and Natural Resource Operations 2011/12 to 2013/14 Land Based Investment Strategy

- Ecosystem restoration
 - Target the recovery of ecosystems that have been degraded, damaged, or destroyed by re-establishing structural characteristics, species composition, and ecological processes.
- Range
 - Focus on those range areas impacted by catastrophic disturbance such as mountain pine beetle, wildfire, and drought.

Land Based Investment Strategy Priorities

Within the scope of the Land Based Investment Strategy, and consistent with the *Forest and Range Practices Act*, and other relevant legislation and standards, the implementation priorities include specific government commitments that need to be addressed when striving to achieve the goals, objectives, and strategic priorities.

Forests for Tomorrow

i. Timber supply mitigation – mid-term timber supply

- Fertilization, spacing, and backlog brushing in the central Interior will focus on mitigating the reduction in the mid-term timber supply by targeting these activities within the “economic fibre-baskets⁷” associated with the following areas⁸:
 - Priority 1: Lakes, Quesnel, Prince George, Williams Lake
 - Priority 2: 100 Mile House, Merritt, Morice, Okanagan
 - Priority 3: Cranbrook, Kamloops, Invermere, Arrow
- Spacing treatments should be focused on managing density of repressed, or potentially repressed, stands with low forest health risks.

⁶ The objective will be to provide unrestricted access to the lowermost parts of the stream network with the emphasis on providing access to the lowest gradient reaches and therefore the most optimal fish habitat.

⁷ Wood fibre, within a reasonable economical distance (e.g. 8.5 hour cycle time), that might be able to assist in addressing the mid-term timber supply shortfalls in an adjacent management unit.

⁸ All forest management units (e.g. Tree Farm Licences, Woodlot Licences, Community Forest Agreements, Timber Supply Areas, etc.) encompassed by the broader TSA name indicated are eligible for treatment if they meet the overall management objective. Priority designation classifies units by the degree of decrease in potential mid-term timber supply. If all factors are equal, treatment should occur within a higher priority unit before a lower priority unit.

- Stands and spacing densities should be targeted for future fertilization treatments.

ii. Current reforestation

- Maintain adequate growth rates on existing government-funded land based investments through vegetation management.
- Annual reforestation level of 13 million⁹ seedlings (at least) with a variety of species¹⁰, on areas where the mid- and long-term timber supply has been impacted by catastrophic disturbance.
- Plant 60 million¹¹ seedlings over four years (2008/09 – 2011/12)¹² on areas impacted by wildfire and mountain pine beetle.
- Eliminate the provincial backlog (pre-1987) Not Satisfactorily Restocked (NSR) by 2015¹³.
- Establish fibre plantations¹⁴, including short rotation plantations, where ecologically and economically feasible¹⁵.

iii. Forest health and invasive plants

- Support improved tree growth by managing and preventing the impacts on the forest and range from pests, disease, and invasive plants

iv. Timber supply mitigation – constrained timber supply

- Fertilization and stand tending (juvenile spacing) on coastal, northwest¹⁶ and southeast¹⁷ forest management units to improve timber availability and value.

⁹ Excludes seedlings planted under Forest and Range Practices Act section 108.

¹⁰ Follow Forest For Tomorrow [Management of tree species composition policy \(#1\)](#) and [Assisted species migration guidance](#).

¹¹ 60M seedling commitment includes seedlings planted under FRPA section 108.

¹² Throne speech commitment 2008.

¹³ Throne speech commitment 2009.

¹⁴ See [Fibre Plantations in British Columbia \(Land Based Investment Program\)](#).

¹⁵ Roundtable on Forestry Recommendation 2009.

¹⁶ Skeena-Stikine and Kalum forest districts.

¹⁷ Districts within the Kootenay-Boundary region.

- Focus on Coast, Northwest, and Southeast forest management units with constrained timber supply and where highest return-on-investment will be achieved.
 - Focus on establishing stands suitable for future fertilization and value improvement.

Tree improvement

- Tree breeding, seed production in orchards, and modifying seed transfer guidance to establish faster growing trees, with more valuable wood, and higher resilience to climate change.¹⁸

Inventory

- Focus site productivity and forest inventory updates on priority units for mid-term timber supply mitigation in the Interior and on ecosystem-based management units on the Coast.

Fire management

- Creation of fire risk planning tools to assist in reducing risk to forest resources and investments.

Fish passage

- Optimize fish habitat gains by targeting high-value sites with the best potential for providing significant fish returns.¹⁹

Range

- Restore range areas impacted by catastrophic disturbance such as mountain pine beetle, wildfire, and drought.

Ecosystem restoration

- Restore ecosystem function of in-grown open forests and native grasslands.

¹⁸ As per the [Forest Genetics Council Strategic Plan \(2009/2014\)](#).

¹⁹ Maintain emphasis on culvert assessments, as they drive strategic prioritization of sites for remediation.

Appendix G: FFT Species Management and Density Targets

Forests For Tomorrow (FFT) Species Management and Density Targets

Objectives¹

- Species mixtures will be planted,
 - Where appropriate, and to the degree reasonable²:
 - areas will be planted with a mixture of desirable species; and
 - on sites with more than one "preferred" species, more than one preferred species (and, where practicable, all of the preferred species) will be planted.
- Species management decisions will be informed by forest-level analysis.
 - FFT species management will be informed by analyses of the long-term, forest-level impact of species choices, where these analyses are available.
- Cumulative impacts, and impacts at the landscape scale, will be considered.
 - Where appropriate, and to the degree practical, FFT will work to improve watershed and landscape composition.
 - Where young stand composition is known to deviate from natural composition³ (as a result of past management), FFT treatments will help to re-establish natural composition.
- Density management⁴ will optimize productivity, future product value, and resiliency of the forest at a stand and landscape level.

FFT Species⁵ and Density Indicators

1. Percent of area planted with more than one tree species
2. Opening area weighted mean dominant species percent in the inventory label at establishment, regeneration delay, and free growing.
3. Percent of area in a management unit planted with a single species
4. Percent of area post-treatment stand composition that is single species
5. Average opening well-spaced density at establishment, regeneration delay, and free growing.

¹ Species objectives from FFT Policy #1 – Management of tree species composition

http://www.for.gov.bc.ca/ftp/hfp/external/!publish/fft_standards_on_cms_web/policy/Policy1_FFT.pdf

² This statement also reflects the degree to which suitable seed is available.

³ Consistent with goals relevant to climate change, as well as other, biological, social and economic objectives

⁴ At establishment and through post-establishment treatments

⁵ From FFT Policy #1 – Management of tree species composition

Targets

- 80 % of the area planted within a management unit, where funded by FFT, should have 2 or more species in the silviculture label at the time of establishment
- In ecosystems with more than one preferred species, where practicable, no one species should comprise more than 70% of the composition of the inventory label of an opening area at establishment, regeneration delay, and at free growing
- Establishment and regeneration delay density management target well spaced stocking⁶ of, at least, 1200 sph (interior) and 900 sph (coast) for non-lodgepole pine dominated stands and, at least, 2000 sph for lodgepole pine dominated stands (i.e. > 50 % of the species mix is lodgepole pine) at free growing declaration.

Caveats

- Professional decisions to deviate from the objective will be recognized in those situations where it is ecologically appropriate (i.e. forest health- rusts, frost, weevil, root rot, the site being a complex of more than 1 site series, etc).

Appendix H: Actions from FFT Spring 2012 Richmond Workshop

Below are the Actions from the Spring 2012 FFT Workshop that are in the Meeting Synopsis:

Session 1: Improving Planning and Delivery

Action #1a: Meet with Regional Executive Directors (REDs) to make clear that the letters that go out in April regarding the allocation mean 'go' (start spending). Al Powelson will attend and make this clear to REDs

Action 1b: Meet with Regional Management Team (RMTs) to make this clear as they include a finance person. Craig Wickland will do this for the Coast regions, and this should be done also by regional staff involved in FFT for northern and southern interior regions.

Action #2: Develop contract management questions, concerns or scenarios and send them to Nigel Fletcher. Nigel will then convey to Vicky Taylor and provide district/regions with answers.

Action #3: Two provincial meetings will be put in LBIS key dates: one in September and one in March.

Session 2: Planning and Funding for FY 2012/13

Action #4: Regions/districts to help refine handouts. Kelly Osbourne will send letter to remind people to refine the goals in the handout. The handout needs to be refined next week (by March 16th).

Note: This action has been completed.

Action #5: FFT allocation letters will be cc'd to Districts. That way they know they can proceed with the work. The FFT allocation letters will also be shared at FFT calls. The Stewardship Leadership Team can also help communicate the letters to regions/districts so that work can be initiated.

Action #6: Send any comments or concerns to improve the Silviculture Funding Criteria document to Al Powelson. Next year's version can then address that feedback

Session 3: Delivery Options in FY 2012/13

Action #7: An overhead allocation letter will be prepared and sent to clarify how it will be implemented and used. Dave Cornwell noted that its use needs to be directly related to delivery goals.

Update – Regional Executive Directors have been provided a briefing on overhead allowances.

Session 4: Delivery Considerations

Action #8: A final report is being prepared that addresses the current reforestation review. (this is in response to Nigel's presentation where he went over a recently review of the current reforestation program largely under the previous recipient agreement approach)

Action #9: Districts need to complete the quarterly report by April 15th, 2012

Action #10: Regions/districts let Nigel know of the reporting applications can be improved

Adjourn

Action #11: Please send any feedback to Dave Cornwell on how you feel the meeting went. Was the meeting worthwhile from your perspective? Did it meet your expectations? How could it have been better?

Appendix I: LBIS Delivery Approach



Forests, Lands and Natural Resource Operations

February 13, 2012

2012/13
to 2014/15

LBIS Delivery Approach



Foreword

This document was developed to provide operational clarity and identify:

- Historical delivery of various programs
- Recent Land Based Investment program delivery
- Delivery process for 2012 to 2014
- Delivery process, including key roles and responsibilities, for future years
- Recommendations for district, regional and headquarters staffing and support for Land Based Investment delivery

We would appreciate any suggestions for improvement or clarity. Please send comments to Dave Cornwell at Dave.Cornwell@gov.bc.ca.

This draft was last updated on February 13, 2012.

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Delivery Model

The new Land Based Investment Strategy (LBIS) delivery model incorporates decisions based on a stated ministry objective or preference for in-house delivery where possible, and other options being available as deemed necessary. This document provides guidance to managers when setting workload priorities and assigning staff resources for LBI delivery.

1.0 History of Delivery of Government-Funded Forest Management Activities

Since the initiation of the BC Forest Service almost a century ago, both the government's range of activities and the role of local forest managers have expanded. However, periodic variation in that general model of local involvement and control has included the divestment of government and local involvement in activities such as silviculture, forest health and inventory. These activities have been conducted under various programs, including Forest Renewal BC (FRBC), the Forest Investment Account (FIA), and the Forests for Tomorrow (FFT) program.

Each of these recent models provided government funds to other parties to carry out government objectives. While some of these programs undertook many worthwhile activities, their outcomes may not have always aligned with the strategic needs and objectives of the government, nor were all of these activities always undertaken in the most cost-effective and efficient manner.

The following history of program delivery demonstrates the evolution from the government's direct management to shared delivery with forest licensees and others.

1930-1995: Districts, Regions and Headquarters had a hands-on oversight and coordination role of most government funding sources

- The ministry managed strategic priorities and budgets.
- Delivery was done by districts, regions, headquarters, the small business program and licensees.

1995-2002: FRBC took a lead role in managing a significant portion of government forestry funding

- Delivery was conducted by licensees with planning by district staff in the early years
- Budget allocations were based on cubic metres cut, meaning that expenditures were not necessarily strategic in nature or based on need by management unit, region or provincially.
- Backlog reforestation and rehabilitation of problem stands were significantly reduced due to year-to-year funding uncertainty.

1999-2003: Silviculture strategies were developed and in place for all major units in BC

- Strategies were developed with licensee and district involvement.
- FRBC and FIA funding was to be aligned with the silviculture strategies but there was limited district review or strategic approval of activities being funded in the district.
- Limited backlog reforestation was done due to uncertainty in year-to-year budget allocations.

2002-2005: FIA

- PricewaterhouseCoopers (PwC) had a lead role, with delivery by licensees.
- Limited District and ministry guidance and involvement in determining activities or on cost control.
- Limited backlog reforestation was done due to uncertainty in year-to-year budget allocations.

2005-2010: FIA and FFT

- About 95% of delivery was by licensees and recipients under contract to the ministry through PwC.
- FFT funding was assigned to key management units with high wildfire and mountain pine beetle impacts.
- There was limited district engagement in strategic guidance, priorities and oversight of program direction.
- Elimination of the Silviculture Branch and dedicated silviculture staff in regions and districts to coordinate silviculture activities within a TSA reduced direct communication and planning structure between branch, regions and districts.

2010: FIA and FFT combined into LBI

- The new Land Based Investment Strategy (LBI) included FFT encompassing reforestation and incremental silviculture activities.

2011: Districts more involved in strategic priorities and placement

- 30% of FFT program delivered by Districts.

2.0 Key Principles

The Land Based Investment delivery approach incorporates seven key principles that are addressed through this revised delivery approach. These principles are:

1. Programs will have the required financial and staff resources for LBI delivery, from strategic and operational planning through to delivery and monitoring.
2. Activities are coordinated with the overall management unit strategy to avoid conflicts with other resource values.
3. Government retains authority for decision-making and overall program control to ensure provincial strategic objectives are met, as well as to ensure best value for money.
4. Investments are sound business decisions that are targeted to meet provincial and management unit objectives.
5. A strategic focus will address priority issues that can be mitigated through a silvicultural response.
6. The scale and tactical location of treatments undertaken within the identified priority units will have a meaningful positive timber supply effect.
7. Continuity and consistency of treatments will ensure that the desired objectives are achieved over time (e.g., rehabilitation and reforestation of MPB areas).

3.0 Current Capabilities

Capability is a reflection of two key factors. The first is that staff workload priorities are strongly influenced by executive and management direction and thus delivery options. The second factor is available expertise.

The following information reflects current capabilities for Land Based Investment delivery:

- A September 2011 review indicated that over 65 ministry staff are directly involved in the LBI program in oversight and planning, each spending 0.1-0.8 full time equivalent (FTE) time. The ministry has approximately 24 FTEs in total allocated to delivering the LBI program.
- In 2011, about 90% of the Tree Improvement, Inventory, Fire Management, Ecosystem Restoration, Range and Recreation categories are coordinated and managed by ministry staff.
- About 91% of forest health activities are being delivered through district and regional staff.

In 2011, the current reforestation and midterm timber supply mitigation activities are being delivered in the following manner:

- BCTS will deliver 12% of the FFT program based on varying levels of staff throughout BC (the following percentages are approximate):
 - 22% of program delivery by BCTS is occurring in the Southern Interior
 - 2% of delivery is occurring in the Northern Interior
 - 19% of program delivery is occurring on the coast area
 - Increasing involvement by BCTS is anticipated in future years
- Industry and recipient agreements will deliver 65% of current reforestation and midterm timber supply mitigation activities, with recipient agreements (Interior only) administered by regional ministry staff.
 - Licensees have varying interests and abilities to deliver current reforestation, forest health and timber supply mitigation activities. For example, while about 80% of the fertilization program is delivered by licensees, staffing reductions in many areas have reduced industry's current ability to be involved in FFT programs that require extensive long-term planning and projects.
- Districts internally manage 23% of current reforestation and midterm timber supply mitigation activities. About 30% of the districts have dedicated stewardship staff focussed on silviculture. The remaining 70% are seeing historical knowledge in strategic planning, implementation and program delivery lost to retirements or re-assignments. Throughout BC, the ministry also has varying levels of staff; the following percentages are approximate regarding district delivery:
 - 42% of district delivery is in the Southern Interior
 - 17% is in the Northern Interior
 - 8% is on the coast
- Section 7.0 of this document outlines key recommendations for staffing and delivery in 2012-2014.

4.0 Key Objectives

The new LBIS delivery model will address the following objectives:

- Ensure that the ministry serves as the steward on behalf of the public so that provincial priorities are addressed and public funding is cost-effectively applied in the right investments.
- Develop organizational capacity, clear direction and continuity of programs.
- Create transparency and understanding of strategic priorities, plans and budgeting.
- Improve communication between and among district, regional and headquarters staff for program effectiveness, as well as to recognize associated workloads.
- Clearly outline the prime local regional and district contacts and dedicated champions for the LBIS program.
- Ensure continuity of projects over time to follow through on key existing and previous investments (particularly imperative for multi-year projects and those that may cross fiscal years).
- Deliver projects in an efficient, cost-effective and timely manner.

5.0 Roles and Responsibilities

Comprehensive planning, delivery, reporting and monitoring, continual improvement and adjustment are required to efficiently deliver the LBI program. Provincial, regional and district staff need to fulfill a number of key roles and responsibilities to effectively deliver the LBI program.

5.1 Planning

The planning model outlined below is illustrated and described further in Appendix 1.

Deputy Minister

- Approves the Land Based Investment Strategy.
- Approves the transfer of funds between investment categories.

Executive Director – Corporate Initiatives Division

- Conducts land-based Investment planning as it relates to the determination of provincial priorities, goals, objectives, and eligible activities. Receives inputs on priorities and coordinates with other agencies such as Ministry of Energy Mines, Ministry of Environment and Agriculture

Regional Executive Directors

- Sets the priorities for staffing as it relates to delivering on provincial goals and objectives and associated regional budgets.

Resource Practices Branch (RPB)

- Manages the Land Based Investment strategic planning process by:
 - Determining, and coordinating the design of, indicators, targets and tactics for each investment category
 - In conjunction with the Corporate Initiatives Division, determining provincial priorities.
 - Developing and assessing the Land Based Investment Strategy.

- o Allocating investments to, and within, investment categories based on government goals, objectives and priorities, along with the opportunities for investment in a manner that considers the needs of each region of the province.
- Communicates the LBIS including provincial goals, objectives, indicators and targets to FLNRO staff, other government agencies, First Nations, and stakeholders.

Investment Category Leads

- Participate in the determination of investment category specific indicators and targets required to achieve provincial priorities, goals, and objectives.
- Collaborate with regions and the RPB in determination of tactics required to achieve provincial goals, objectives, indicators, and targets.
- Manage activity standards in collaboration with RPB where the Investment Category Lead is responsible for delivery.
- Communicate investment category specific indicators, targets, and tactics to FLNRO staff, other government agencies, First Nations, stakeholders, and delivery agents, including:
 - o Coordinating First Nations information sharing for those investment categories where the Investment Category Lead is responsible for delivery.
- Support the Land Based Investment planning process, including:
 - o Coordinating, providing advice for, and participating in, the design of tactics for the specific investment category.

FLNRO Regional Specialists

- Provide input to the development of investment category specific indicators and targets required to achieve provincial priorities, goals, objectives including the identification of strategic gaps and opportunities
- Collaborate with investment category leads and RPB in the recommendation of tactics required to achieve provincial goals, objectives, indicators and targets.
- Balance activity proposals to optimize achievement of regional indicators and targets in alignment with provincial goals and priorities.
- Collaborate with RPB in the development of cost caps
- Communicate and be the primary point of contact with regional delivery agents regarding provincial and regional indicators, targets, and tactics
- Support the Land Based Investment planning process by:
 - o Collaboration with Category Leads developing planning process requirements.
 - o Guide and assist regional delivery agents in the 5 year operational and annual plan development process for the region.
 - o Coordinating, providing advice for, and participating in, the design of tactics for the respective region in cooperation with Districts.
 - o Working with RPB to determine Regional budget allocations based upon annual plan submissions in consideration of the Provincial budget and targets.

FLNRO District Staff

- Conduct strategic planning at the local level
- Identify priority treatment areas in the context of provincial priorities, tactical planning and overview analysis of eligible ground (excludes surveys)
- Assist regional staff specialist or investment category leads in the recommendation of tactics required to achieve provincial goals, objectives, indicators and targets.
- Communicate provincial, regional, and District outputs, targets and tactics to regional and other district staff
- Support the Land Based Investment planning process by:
 - providing advice for, and participating in, the design of tactics for the respective district
 - leading the 5-year operational and annual plan development process for the district and coordinating plan development with licensees, BCTS and recipients.
- First Nations consultation process – review of information sharing done by delivery agents to ensure it is adequate for the proposed LBI project(s) to proceed.

BCTS, Timber Tenure Licensees, Recipients and Consultants

- Enabled (but not required) to engage in Land Based Investment planning, monitoring and other activities, partnered with the FLNRO or other government agencies.

5.2 Delivery

Land Based Investment delivery begins at the Branch level, and includes regions, districts, BCTS, licensees, recipients and consultants.

Resource Practices Branch (RPB)

- Achieves the Land Based Investment Strategy by:
 - leading the coordination and determination of the effective and efficient delivery of the Land Based Investment Strategy.
 - leading the development of a delivery framework with input from Investment Category Leads and Regional/District/BCTS staff .
 - collaborating with the Investment Category Leads on the tactics required to achieve provincial goals, objectives, indicators, and targets.
 - preparing a 3 year business plan for operational delivery where RPB is responsible for delivery.
 - managing activity standards in collaboration with investment category leads.
 - developing cost caps in collaboration with investment category leads and regional staff specialists
 - building an annual project plan that outlines specific activities for those investment categories where RPB is responsible for delivery.
 - providing policy and guidance on delivery.

FLNRO Regional Specialists

- Determine the best delivery strategies for each TSA . Regional specialists will work with Districts to select the most qualified, efficient delivery agents within each TSA.

- Provide (through allocation letters) funding to the delivery agents to accomplish their assigned works
- Provide direction to delivery agents with respect to how their FFT allocations are to be managed and the timing and content of financial reporting to the Region and Branch
- Work with RPB to identify and manage Delivery Agent identified surpluses and/or funding pressures basis
- Provide technical and administrative direction to delivery agents.

FLNRO District Staff

- Achieve the portion of the Land Based Investment Strategy within their respective District where they are directly responsible for delivery
- Ensure cost efficiency and strategic delivery of activities funded by LBIS
- Ensure continuity of key activities needed to support government goals and objectives, i.e. , that once priority activities are started, appropriate follow-through treatments are undertaken on the areas in a timely fashion to protect and realize the value of the original investment.
- Identify the key delivery agents for the local LBIS program.

BCTS, Timber Tenure Licensees, Recipients and Consultants

- Responsible / Obligated to meet standards for any contracted activity.

5.3 Reporting and Monitoring

The Branch, investment category leads, regions and districts all contribute to LBI reporting and monitoring.

Resource Practices Branch (RPB)

- Report:
 - Compile accomplishments of the LBIS to report to Executive and public
 - Coordinate compilation of accomplishments not managed by RPB
- Audit/Quality assurance to ensure that activities undertaken to achieve tactics are consistent with government standards where RPB is responsible for delivery.

Investment Category Leads

- Report achievement of the LBIS outputs and targets to the RPB
- Audit/Quality assurance to ensure that activities undertaken to achieve tactics are consistent with government standards where the Investment Category Lead is responsible for delivery.

FLNRO Regional Specialists

- Report achievement of the LBIS outputs to RPB where RPB is responsible for delivery or to the investment category lead in all other cases
- Audit/Quality assurance to ensure that activities undertaken to achieve tactics are consistent with government standards, by:
 - monitoring program implementation collaboratively with RPB and District staff

FLNRO District Staff

- Report achievement of the LBIS outputs where the district is responsible for delivery.

- Audit/Quality assurance to ensure that activities undertaken to achieve tactics are consistent with government standards, including:
 - monitoring program implementation collaboratively with RPB and regional staff
- Ensure all activities are reported into the appropriate data system in a timely and accurate fashion.
- Complete quarterly and annual reporting of key accomplishment and trends.

5.4 Continual Improvement and Adjustment

Continual improvement and adjustment are addressed at all levels, from Branch to districts.

Resource Practices Branch (RPB)

- Evaluates:
 - The impacts of tactics on achievement of targets, indicators, and goals.
 - The balance of allocations to investment categories for achieving the provincial goals and objectives.
 - monitoring program implementation collaboratively with regional staff specialists
 - The effectiveness, value for money and efficiency of various types of delivery agents to achieve provincial objectives and goals.

Investment Category Leads

- Assists RPB in the evaluation of:
 - the impacts of tactics on achievement of targets, indicators and goals.
 - the balance of allocations to investment categories for achieving the provincial goals and objectives.

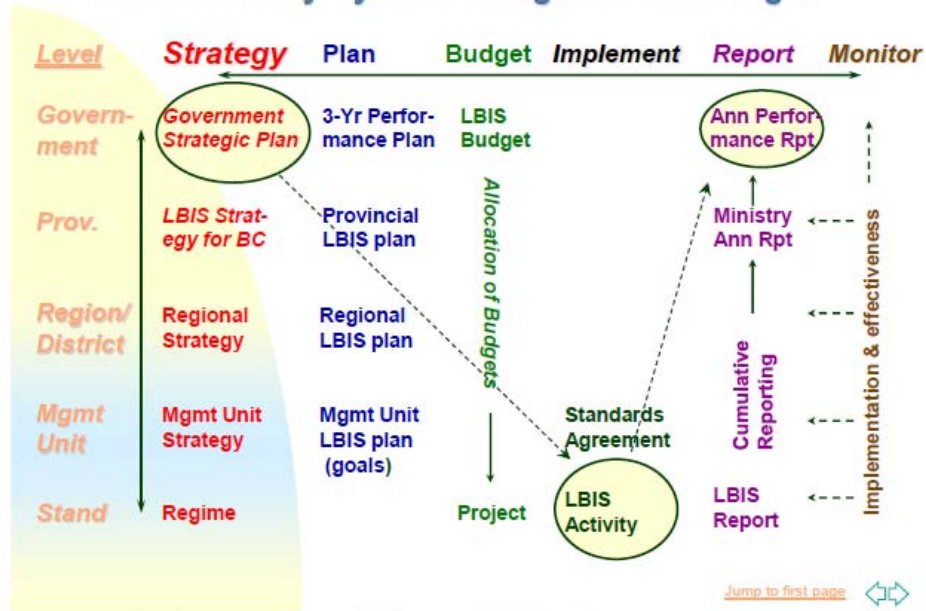
FLNRO Regional and District Staff

- Identify and communicate significant natural resource issues within the region and district.
- Identify and communicate LBIS program planning and delivery issues.
- Assist in continual improvement of the LBIS program.
- Ensure key results of monitoring and continual improvement ideas are incorporated in the new fiscal year programs.
- Identify the effectiveness and efficiency of various types of delivery agents.

5.5 Managing Linkages between Activities

Ministry staff are responsible to manage linkages between activities, as shown below:

LBIS Delivery System Categories & Linkages

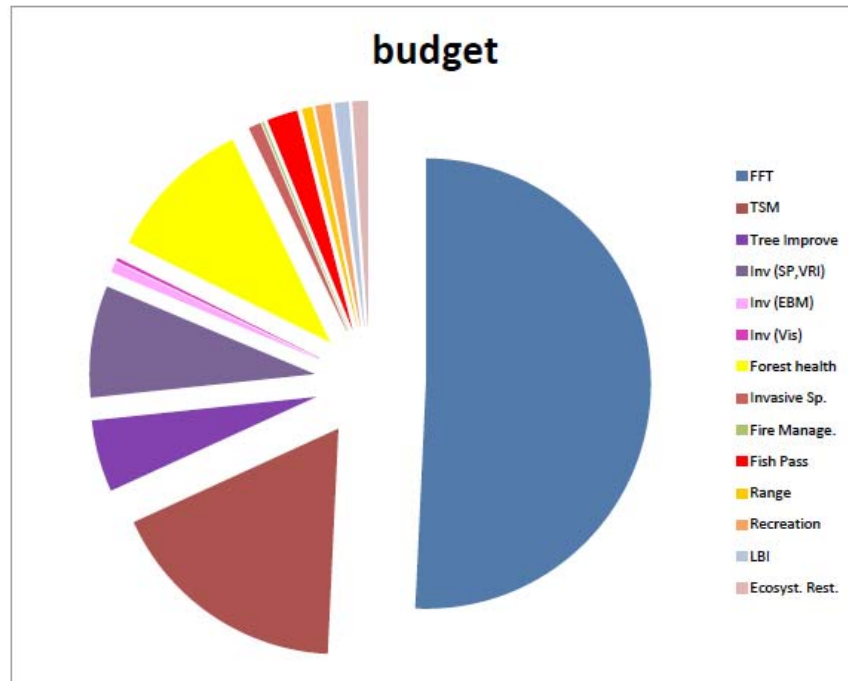


6.0 Goals and Objectives for 2012 to 2014

For planning and staffing purposes over the next three years, the LBIS program is assumed to have approximately similar overall goals and budget profile to those of 2011/12.

Investment Category	Sub Category	2011/12 (\$ M)
Forests For Tomorrow	Current reforestation	34.515
	Timber Supply Mitigation	11.85
	Forest health	7.16
	Invasive plants	0.60
Tree Improvement		3.5
Inventory	Site Prod., VRI	5.45
	EBM	0.50
	Visual	0.15
Fire management		0.085
Fish Passage		1.5
Ecosystem Restoration		0.75
Range		0.50
Recreation		0.75
LBI Plan		0.69
Total		68.0

Proportionally, the budget allocation is anticipated to be as follows:



The budget allocation assumptions are:

- 50% will go to the Southern Interior
- 40% will go to the Northern Interior
- 10% will go to the coast

7.0 Recommendations for Staffing and Delivery

A wide variety of staffing and delivery models could be used to deliver the LBIS program, and a number of options were considered. The following option will be used given the ministry's limited budgets and staffing.

7.1 District

- One person will be formally assigned responsibility in their Employee Performance and Development Plan (EPDP) to be the key district contact for the LBIS program.
- Each district is recommended to provide core staff contact for supporting the following roles:
 - Coordinating and developing plans (August-March)
 - Coordinating delivery agents and ensuring goals are assigned to appropriate delivery agents (March-April)
 - Project implementation (year-round where district is delivery agent)
 - Reporting and monitoring (year-round)
 - Continual improvement and adjustment (January-March)
- The current staffing ranges from 0.2-0.5 FTE/district and should be increased commensurately with the budgets or program allocated to the district.
- The district contact would represent the District Manager on all key meetings for LBIS.
- The district contact would be responsible for organizing the annual local LBIS planning session every fall and implementation meeting each spring, to debrief what went well and what needs to be adjusted in the upcoming field season. The district contact would also identify and coordinate the key delivery agents in the upcoming field season. The district would coordinate with the region where there are regional delivery service agreements in place.
- The ministry will have a varied delivery model for LBIS activities. Depending on regional and district priorities, the ministry may use:
 - Internal staff
 - BCTS staff
 - Licensees
 - Recipient agreement holders to deliver on behalf of the district
- The district contact will be responsible for determining with the District Manager the best mix of delivery that meets government goals and objectives, given funding constraints and available staffing.

7.2 Region

- One person will be formally assigned responsibility in their EPDP to be the key regional contact for the LBIS regional program.
- Each region is recommended to allocate one core staff contact for supporting the following roles:
 - Coordinating and developing plans (August-October)
 - Coordinating delivery agents and ensuring goals are assigned to appropriate delivery agents (March-April)
 - Reporting and monitoring (August-Oct, March)
 - Continual improvement and adjustment (January-March)
- The current staffing ranges from 0-1.8 FTE/Region and should be increased commensurately with the budgets or program allocated to the region.

- The regional contact would represent the Regional Manager on all key meetings for LBIS.
- The Regional contact would be responsible for organizing annual regional LBIS planning sessions each fall and annual regional LBIS implementation meetings each spring, to debrief what went well and what needs to be adjusted in the upcoming field season. Where the regional office holds recipient agreements, the regional contact would also be responsible for identifying and coordinating who the key delivery agents would be in the upcoming field season and communicating with annual plans with the District Manager.

7.3 Headquarters

- For each LBIS category, one person will be formally assigned responsibility in their EPDP to be the key lead for the provincial LBIS category.
- LBIS category leads will be responsible for securing committed consistent allocation of staffing and financial resources to ensure positive and lasting strategic impacts on forest management.
- Headquarters branches and executive will be responsible for ensuring that strategic goals and objectives are achieved in an effective and consistent manner.
- Current staffing is 5 FTEs.
- Individual category leads will be responsible for overall management of their category budgets and delivery of their overall assigned provincial goals.
- Headquarters category leads need to continue ensure good communication on goals and objectives and seek cross-program integration, synergies and budget management.
- The provincial category leads would continue to advocate and represent their business needs on all key meetings for LBIS.
- The Resource Practices Branch LBIS lead contact would be responsible for organizing annual LBIS planning sessions each fall and ensuring the service plan is completed by November 1.
- The Resource Practices Branch LBIS lead contact would also be responsible for organizing annual provincial LBIS implementation meetings each spring, to debrief what went well, what needs to be adjusted in the upcoming field season.

Appendix 1. Proposed Planning Model for Land Based Investment Planning Committees for Forest Management Units

1.1 Introduction

The development of a consistent structure for land-based investment planning across the province will lead to more transparent and effective decision-making at the local level, along with coordination and feedback loops between Branches, regions and districts.

The Land Based Investment Planning process involves a defined Forest Management Unit committee working with Branch, regions and districts using a constant feedback loop. However, the success of the proposed committees in providing streamlined and clear direction regarding investment decisions depends on the quality of the information provided to them. Although local expertise is an important part of the process, quantitative data are critical to good decisions.

This proposed planning model description provides details on the membership, structure and goals of the committee that would be responsible for determining forest management unit land based investment for non-obligation silviculture activities.

1.2 Principles

The principles for land-based investments are:

-
1. The planning process should encourage local ownership of each program through the involvement of local constituents with knowledge of timber supply, First Nations and environmental values.
 2. Goals and Objectives must be clear and specific.
 3. Indicators and targets that measure the state or condition of the landbase must be directly related to the goals and objectives.
 4. Targets must be easily measurable, verifiable, and relevant to the associated indicator.
 5. Activities must have the potential to impact target values.
 6. Activity outputs must be of scale large enough that the impact is measurable.
 7. Activities focusing on log quality must be of sufficient scope and duration to provide opportunities for the development and marketing of value-added products.
 8. Reporting of activity outputs is an essential part of all activities.
 9. Investment strategies must be based on real opportunities, and must be flexible to allow adaptation to changing goals and objectives.
 10. Investment priorities for each land base must be commensurate with the productive capacity of the site and forest management unit.

1.3 Overview of the Provincial Structure

The proposed structure identifies three levels of decision-making:

1. Provincial Land Based Investment Steering Committee,
2. Regional Land Based Investment Committees, and
3. Forest Management Unit (FMU) Land Based Investment Planning Committee Levels with FMU Land Based Investment Technical Teams for support.

Figure 1 outlines a proposed planning model details of the proposed structure, goals and responsibilities of these teams involved in this planning model are outlined in the sections below.

DRAFT

1.4 Provincial Land Based Investment Planning Committee

The Provincial Land Based Investment Planning Committee would include representatives from each of the Regional Land Based Investment Planning Committees, investment categories, and other Ministries. This committee sets priorities and provides high-level goals, indicators, and targets for the Province; makes recommendation on the investments, and advocates for resources at the Provincial level. The Provincial Land Based Investment Planning Committee sets the schedule for reporting by the Regional Land Based Investment Planning Committee to meet program budgeting deadlines.

Provincial Land Based Investment Planning Committee

Focus:

- Provincial indicators and targets
- Provincial balancing of activities to achieve goals and objectives
- Investment priorities

Members:

1. Ministry of Forests, Lands, and Natural Resource Operations Provincial Land Based Investment staff (lead),
2. Chairs of the Regional Land Based Investment Committees,
3. Provincial Investment Category Leads

Role:

- Provides direction to the Regional Land Based Investment Planning Committee on indicators and targets (e.g. volume, product values, species objectives) for each investment category and geographic area
- Sets investment priorities and areas
- Annually reviews program accomplishments

Decision Making Factors:

Qualitative

- Government goals, objectives and commitments
- Regional Land Based Investment Planning Committee recommendations

Quantitative

- Program accomplishments
- Overview of Regional Land Based Investment Planning Committee data

Committee Level Outputs and Responsibilities:

- Provincial specific indicators and targets to the Regional Land Based Investment Planning Committees by investment category
- Support Regional and Forest Management Unit (FMU) plans at higher levels
- Annual review summary and recommendations for changes and continuous improvement;

Committee Level Outputs and Responsibilities:

- Region-specific targets to the District Land Based Investment Planning Level by investment category
- Indicators and Targets to be forwarded to the Provincial Land Based Investment Committee
- Support District plans at higher levels
- Annual review summary and recommendations for changes and continuous improvement to the FMU Land Based Investment Planning Level
- Regional priorities

1.6 District Land Based Investment Committees

Two main levels are involved in the decision-making: a District Land Based Investment Planning Level, and District Technical Teams to utilize members' time efficiently. However, in some cases, especially small TSAs, it may be appropriate to combine into one team.

Plans and activities developed by the Technical Teams would be presented to the Planning Level for approval. The Technical Team would also review and report out on annual program accomplishments and their success in meeting the district targets and indicators.

For both of these groups it is recommended to use existing planning structures already in place to fulfill these roles, such as Timber Supply Area steering committees, or technical groups, such as a local invasive plant and ecosystem restoration committee.

District Land Based Investment Planning Level

Focus:

- critical indicators and targets
- balancing activities to achieve goals and objectives

Members:

1. Ministry of Forests, Lands, and Natural Resource Operations District staff (lead)
2. Chairs of the District Technical Teams
3. Ministry of Environment
4. First Nations
5. Forest license holders
6. Communities

Role:

- Provide direction to the Technical Teams on indicators and targets (e.g. volume, product values, species objectives) for each investment category and geographic area.
- Recommend activities for consideration to the Regional and Provincial Silviculture Land based

Investment Program.

- Annually review program accomplishments and challenges moving forward in relation to the district objectives.

Decision Making Factors:

Qualitative

- Program goals
- Technical Team Recommendations
- District goals and objectives set by HLP or SFMP
- Local knowledge, priorities, issues and direction

Quantitative

- Program accomplishments
- Overview of District Technical Teams data

Committee Level Outputs and Responsibilities:

- District specific Targets to the Technical Teams by investment category;
- Indicators and Targets to be forwarded to the Regional Land Based Investment Committees;
- Support District plans at higher levels.
- Annual review summary and recommendations for changes and continuous improvement to the Technical Teams;
- Regional priorities as identified by the Regional Land Based investment Committee; and
- Presentation by other participants on local concerns, areas/stand types that are not available for treatment; or areas that are of critical importance.

1.7 District Land Based Investment Technical Teams

District Land Based Investment Technical Teams

Focus:

- Subject area expertise

Members:

1. Ministry of Forest, Lands, and Natural Resource Operations District staff plus representatives as applicable from:
 - a. BC Timber Sales
 - b. Forest and Range license holders
 - c. Stakeholder groups
 - d. Other agencies
 - e. First Nations

Role:

- Provide expertise in timber supply, growth and yield, silviculture, forest health, fire management, and inventory
- Make recommendations to the District Land Based Investment Planning Level Review for annual investment activities

Goals:

- Develop specific activities in relation to the indicators and targets articulated by the District Land Based Investment Planning Level.
- Develop a sound knowledge base for land based investment decision-making within each District.
- Annually review the Land Based Investment Strategy and all other relevant plans within the District.
- Report accomplishments quarterly to the District Land Based Investment Planning Level.

Decision Making Factors:**Qualitative**

- Program goals
- Indicators and Targets set by the District Land Based Investment Planning Level
- Local knowledge, priorities, issues and direction

Quantitative

- Land based Investment Strategy and all other relevant plans or strategies
- Potential project and treatments costs
- Multiple Accounts Decision Analysis, Return-on-investment, and net gains from treatments

Technical Team Outputs:

- In relation to the indicators and targets
 - a. District activity priorities
 - b. Priority areas within District
 - c. Proposed cost by treatments.
- Quarterly report accomplishments
- Recommendations on training, analysis, or improvements to the process.

Appendix J: Hand Falling Guidelines

To All Staff,

In the interest of advancing safety in FLNRO falling projects, new hand falling guidelines have been adopted for FLNRO projects (See link below). These guidelines were developed by FLNRO staff who are certified fallers. Feedback and support was solicited from various departments that discharge hand falling and key management teams as well as the Resource Worker Safety Task Team.

Industry is establishing best practices to advance the professionalism of hand falling activities and it is our intent to integrate and support these practices as they apply to our activities. These new hand falling requirements for contracts will take effect April 1, 2013. Although many of the provisions are already in place via WSBC regulations for the forestry sector the intent is to standardize our approach across all of our business. The new requirements will improve safety by requiring contractors to designate a falling supervisor; ensure certified fallers are engaged; and, ensure an adequate falling plan is being followed on FLNRO projects.

Effective April 1, 2013, all hand falling activities must have a designated qualified falling supervisor which extends this existing forestry based requirement to all hand falling activities undertaken by FLNRO. The designated supervisor is not the FLNRO contract administrator but rather part of the contractors resources and will be relied upon by ourselves to ensure competency of fallers and adherence to appropriate falling plans. This will be further supported through our contract administration and monitoring. Falling supervisors will be deemed qualified if they have completed the four day Falling Supervisor Training program provided by the B.C. Forest Safety Council (BCFSC) or are BCFSC certified falling supervisors. In unique circumstances, other qualifications may be considered.

The supervisor does not need to be at the site at all times. The supervisor's role is to monitor the competency of fallers and to ensure that an appropriate falling plan is in place and being followed. The falling plan must include, among other items, a hazard assessment, including danger tree assessment, an appropriate emergency response plan, safety check provisions, and when necessary address procedures such as road closures, aircraft operations and blasting.

Hand Falling Guidelines have been provided for staff reference and apply to contract hand falling and hand falling that is undertaken by our staff:

http://gww.nro.gov.bc.ca/home/safety/directives_procedures/guideline_for_hand_falling.pdf

Further contract provisions and administrative tools have also been provided -- see contract bulletin *#2012-006 – New Qualifications and Requirements for Hand Falling Supervisors:*

https://spc-flnr.gov.bc.ca/HFM_FINMAN/Contract/default.aspx

Please note a transition period through to April 1, 2013 has been established to provide contractors the opportunity to meet these expectations. For this transition period to be most effective, we must ensure that our contracting community is apprised of these expectations as early as possible. It is recommended that all contracts advertised integrate the necessary information, so bidders become aware of the impending expectations. Tools to support this have been provided in bulletin #2012 -006 (See link

above). In addition staff should undertake other communication with any parties that maybe interested in contracts that require hand falling.

Should you have any questions or wish further information, Tom Jackson, Director of Resource Worker Safety, would be pleased to assist you.

Tom

Tom Jensen
Assistant Deputy Minister
Timber Operations, Pricing and First Nations
Ph. (250) 387 - 4429



Guideline for Hand Falling Activities

“Hand falling is one of the highest risk activities undertaken in FLNRO. Staff can assist in avoiding incidents by ensuring this guideline is followed”

Scope: This guideline applies to all hand falling being undertaken by parties under contract of hire or service to the FLNRO or any other participating agencies, and covers hand falling, and supervision of hand falling undertaken by agency staff including WMB for wildfire suppression activities and training.

Purpose: To provide guidance to staff:

- who administer contracts that include hand falling directly or through subcontractors.
- when undertaking hand falling
- so they may ensure appropriate planning is undertaken for all projects involving hand fallers.

Definitions:

Hand falling: The falling of trees by any means with at least one person at or near the base of the tree during falling and not inside a protected cab, where the trees are greater than 6 inches DBH.

Faller: An individual certified by BC Forest Safety Council or ENFORM, and qualified for the slope and timber conditions being addressed (refer to certification level and faller log books See examples in Appendix A). For emergency activities they also include fallers trained by Wildfire Management Branch. (See Appendix A examples).

Falling Supervisor¹: An individual who has completed the BC Forest Safety Council (BCFSC) Falling Supervisor Training Course or is a BCFSC Certified Falling Supervisor or for WMB, having completed the falling supervisor briefing package. A faller supervisor is someone who can plan, coordinate, provide quality assurance, and documentation of falling activities.

¹ Can be applied to FLNRO contracts entered into or awarded after April 1, 2013 with supporting contract conditions.





Falling plan: A geographic based process that defines the project intent and safety protocols. In its simplest version it may include a project planning discussion that reviews the minimum elements and confirms the regulatory requirements of the project are being met.

Emergency: Imminent danger to people, property or the environment. This includes all wildfire suppression activities. Also includes removal of danger trees that constitute a threat to people, property or the environment.

Supervision Considerations:

Hand falling must only be undertaken by fallers, as defined in this guideline. Fallers must give evidence of proficiency for the timber and slope they are working in via certification cards and/or faller log books.

All falling operations will occur under the supervision of a falling supervisor. The falling supervisor (frequently a contractor) remains designated for the project in a manner to address the duration and complexity of the falling activities until replaced by a suitable party. The level of engagement required by the falling supervisor must be determined by the duration, intensity and risk associated with the project. This is determined by the falling supervisor to ensure appropriate risk mitigation.

In the case of WMB activities, WMB qualified supervisors will be used primarily to provide supervision. During peak fire season assistance from BCFSC trained supervisors might be required.

Adequate level of supervision: Operations involving high risk and extended duration, usually involving multiple fallers, may require full time engagement by the falling supervisor to monitor falling activities and adjust plans as necessary. For emergency situations where supervisors are not available or the situation is impracticable, fallers can be used to address Falling Supervisor role.*

** Where small projects require the services of only one faller the faller should also meet the requirements of a falling supervisor and have provisions for summoning assistance.*

Qualified Assistance: Qualified assistance must be able to identify hazards, know the means to control hazards, and to assist with an emergency or injury. Acceptable qualified assistance is determined by the falling supervisor. It may include other fallers, or machines that can get to the site. Where significant falling activity is required to support the project, qualified assistance will generally include other fallers.





Planning Considerations:

A falling plan must be developed with full engagement by the falling supervisor in collaboration with hand faller(s) and others rendering qualified assistance. It is the falling supervisor (frequently a contractor) that will deem the plan to be adequate for the circumstance.

All hand falling will occur in accordance with a plan that addresses at minimum:

- Identification of designated falling supervisor or WMB qualified supervisor.
- Hazard assessment methods specific to site and project
- Emergency response considerations. (Where will first aid come from, are resources adequate, how will an injured faller be evacuated, will weather, location and communication support the operations?)
- Safety check provisions for the crew and with individual hand fallers on a routine and regular basis, visual audible (whistle) pre-scheduled checks and who is responsible to check on whom.
- Safe work procedures for the work being undertaken to ensure the safety of all workers involved in the hand falling operations. (example: road closure procedures for activity near roads, aircraft operations procedures or blasting procedures)
- Qualified assistance must be identified and readily available.
- Alternative methods- what alternatives (i.e. avoidance, blasting) to hand falling will be used for the project, do the hand fallers know about them and how they bring them into play, does the communication system and work environment ensure they will be used when necessary?

Falling plans will vary in nature and content with the intensity of falling and project circumstance but all projects must address the minimum elements specified above. All fallers engaged in the project must be aware of, and undertake their activity consistent with the plan. In addition site/project supervisors, prime contractors, contract administrators must be aware of the plan and must ensure it remains supported at all times.



Summary

FLNRO contract administrators and or project leads must ensure projects involving hand falling:

- are undertaken by fallers (as defined in this guideline),
- involve and engage falling supervisors (as defined in this guideline),
- have adequate falling plans in place.

In addition FLNRO contract administrators and or project leads will ensure, that when a prime contractor is designated, they will organize and coordinate the different employers in order to ensure the falling plan remains supported throughout all falling activities.

This guideline can be shared with contractors for informational purposes and may form the basis for contractual obligations.

“If a safe plan cannot be implemented, work must be curtailed until the circumstances have been addressed, and a safe falling plan is in place”

For more information see

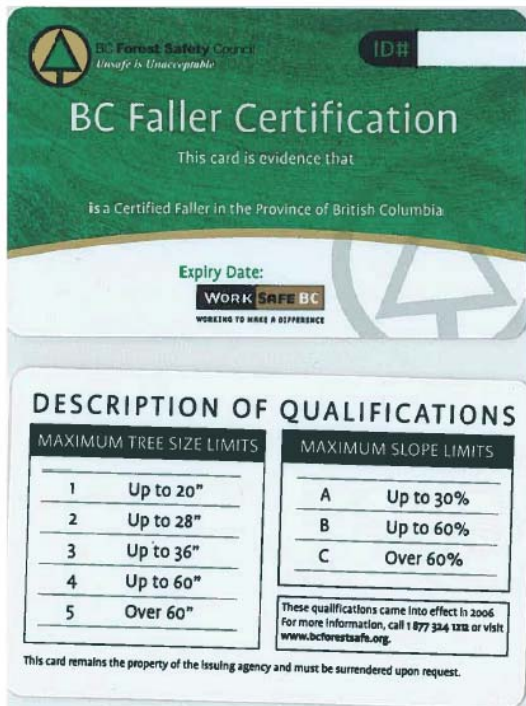
<http://www2.worksafebc.com/Portals/Forestry/FallingAndBucking.asp?reportid=31674>

<http://www2.worksafebc.com/publications/OHSRegulation/Part26.asp#SectionNumber:26.20.1>

See Appendix A for example certification and qualification documents.

Appendix A

Guideline for Hand Falling Activities



BC Forest Safety Council Certification Examples





ENFORM Certification Example


BC Wildfire Management Branch
Chainsaw Certification
 In accordance with *BC Wildfire Management Branch* standards:



 Is hereby certified as a chainsaw operator at the following level:
☐ Bucker ☐ Faller ☐ Trainer ☐ Instructor

 Certified by: ☐ Trainer ☐ Instructor _____ Employee # _____

 Date (yyyy mm dd) _____ Revised: 2011 June

Wildfire Management Branch Certification Example

Wildfire Management Branch
Logbook Example

	Wildfire Management
Wildfire Management Branch Chainsaw Logbook	
Name _____	
FS  HPR 2008/03	

Appendix K: Safety Conditions



Schedule Safety Conditions

File:

Attachment to the Agreement with _____ for _____.

Terms such as “employer”, “independent operator”, “multiple employer workplace”, “owner”, “prime contractor”, and “worker” have the meanings given those terms by Part 3 of the *Workers’ Compensation Act* (*WC Act*).

ARTICLE 1 OTHER SAFETY CONSIDERATIONS

Notice of Project

- 1.01 In accordance with the *WC Act* and its regulations, the Contractor must submit a notice of project, as applicable, to WorkSafe BC, unless the Contractor is notified in writing that the Province will submit the notice of project. Where the Contractor submits the notice of project, a copy must be provided to the Province. Where the Province submits the notice of project, the Contractor must provide, upon our request, all the information necessary to support the notice of project and the Province will provide the Contractor with a copy of the notice of project.
- 1.02 The Contractor will commence and conduct all operations consistently with the notice of project.

Reporting

- 1.03 The Contractor must immediately submit written notice to the Province on all matters reported to WorkSafe BC by the Contractor or the Contractor's Subcontractors. The written notice must include all information necessary to allow the Province to adequately collect and address safety or other related incidences, but will be anonymized so as not to include personal information about an identifiable individual including their name, address, telephone number, age, sex, race, religion, sexual orientation, disability, fingerprints, or blood type, health care, educational, financial or employment history and anyone else's opinion about the individual. This scope does not include business contact information (e.g., name, title, address, telephone or fax numbers or email address used for business contact purposes).
- 1.04 Where the Province brings safety concerns to the attention of the Contractor, it shall give full consideration to the issues raised and provide the Province with a considered response, including any information necessary to demonstrate that the Contractor is in compliance with *WC Act* and its regulations.
- 1.05 The Contractor or any Subcontractors must, upon the Province's request, provide evidence to the satisfaction of the Province that the Contractor or its Subcontractors have:
- (a) an employee monitoring system that will periodically ensure the well being of all the Contractor's or its Subcontractor's employees commensurate with the risks associated with the employee's activities; and
 - (b) an emergency response plan and employee understanding of said plan that will ensure adequate and timely response to any emergency that can be reasonably expected to occur

- in relation to the Works or Services being performed; and
- (c) evidence of training and any required certifications required under *WC Act* or its regulations; and
- (d) evidence of a maintenance program for all equipment and vehicles owned or operated by the Contractor or its Subcontractors commensurate with the risks associated with such equipment and vehicles.

ARTICLE 2 PRIME CONTRACTOR PROVISIONS

- 2.01 The Contractor acknowledges, agrees, and warrants that:
- (a) The Contractor will be considered to be the Prime Contractor and shall enter into a Prime Contractor Agreement with the Province and shall carry out the duties described therein, where any of the following conditions exist:
 - (i) the Province gave notice that the Successful Bidder would be the Prime Contractor;
 - (ii) the Province designates the Contractor to be the Prime Contractor at any time during the performance of the Work or Services;
 - (iii) the Contractor creates a multiple employer workplace through subcontracting any of the Work or Service at any time.
- 2.02 Where the Contractor is being considered as the Prime Contractor as per clause 2.01, the following is applicable:
- (a) upon request, the Contractor must satisfy the Province that the Contractor has the experience and capacity to address Prime Contractor responsibilities in accordance with the Agreement and the *WC Act* and its regulations; and
 - (b) the Province provides written acknowledgement of the Contractor's experience and capacity to function as Prime Contractor; and
 - (c) where the Contractor creates a multiple employer workplace, the Contractor will provide or acquire at their own expense all resources necessary to discharge the Prime Contractor responsibilities; or
 - (d) the Province may, in its sole discretion, give consideration for compensation related to any additional costs where, after commencement of the work, the Province creates a multiple employer workplace and designates the Contractor to be the Prime Contractor.
- 2.03 Where the Contractor is an Endorsed New Entrant by BC Forest Safety Council, the Province will not consider the Contractor to be qualified to function as a prime contractor and the Contractor will be unable to subcontract in any manner that will create a multiple employer workplace.
- 2.04 The Province may from time to time give prior written notice that a person other than the Contractor is designated as the Prime Contractor. The Contractor agrees that on receiving such written notice, the Contractor will cooperate with the Prime Contractor and shall coordinate health and safety activities and ensure compliance with the Prime Contractor's safety program.
- 2.05 The Contractor shall, upon becoming aware of any apparent deficiencies in the Prime Contractor's work which would affect the Work or Services, shall report such deficiencies in writing to the Ministry Representative.

ARTICLE 3 HAND FALLING

- 3.01 Where hand falling activity will be taking place under the Agreement and without limiting any other provision of the Agreement or the Contract Documents, the Contractor shall comply with the following safety requirements.
- 3.02 Hand falling means the falling of trees by any means with at least one person at or near the base of the tree during falling and not inside a protected cab, where the trees are greater than 6 inches diameter at breast height (DBH), or as may be determined by WorkSafe BC.
- 3.03 The Contractor must ensure that:
- (a) all hand falling is undertaken by fallers certified by BC Forest Safety Council (BCFSC) or ENFORM and are qualified for the slope and timber conditions being addressed;
 - (b) a qualified Falling Supervisor satisfactory to the Province is designated for all forestry related hand falling activities and for all non-forestry related hand falling activities taking place on or after April 1, 2013.
- 3.04 A Falling Supervisor will be deemed qualified where:
- (a) it has satisfactorily completed the BCFSC Falling Supervisor Training course; or
 - (b) it is BCFSC Falling Supervisor Certified; or
 - (c) in the Province's sole opinion, evidence of qualifications/certifications and proficiency for the timber and slope for the Work Area and competency to discharge the expectations of a falling supervisor is satisfactory.
- 3.05 No hand falling operations will commence without the Province's prior satisfaction of acceptable proof of qualification/certification and of the Falling Supervisor's ability and competence.
- 3.06 The Contractor must, at least five Work Days prior to commencement of any hand falling operations, notify the Ministry Representative of the name of the designated Falling Supervisor or substitution thereof.
- 3.07 A Falling Plan must be developed with full engagement by the Falling Supervisor in collaboration with Hand Falling personnel and others responsible to discharge aspects of the falling plan.
- 3.08 The Contractor must ensure:
- (a) no work will commence prior to all considerations of the Falling Plan being implemented as established by the designated Falling Supervisor;
 - (b) all hand falling operations performed occur and are supported in accordance with the Falling Plan; and
 - (c) upon request of the Ministry representative, provide any documents and evidence to verify adherence to the Falling Plan.
- 3.09 If the Contractor engages a subcontractor as its Falling Supervisor, the Contractor shall not be relieved from the subcontracted obligations or any obligations under this Agreement.

Appendix L: Sample ITT Package

SAMPLE ITT PACKAGE

ITT Cover Sheet and Contents List



Ministry of
Forests, Lands and
Natural Resource Operations

Invitation to Tender For PROJECT

TABLE CONTENTS

- ☒ Invitation to Tender Notice
- ☒ Information to Bidders
- ☒ Conditions of Tender
- ☒ Specimen Contract with schedules
 - ☒ Schedule A – Services
 - ☒ Schedule B – Payment
 - ☒ Schedule C – [Additional Specifications](#)
 - ☒ Schedule D – Insurance
 - ☒ Schedule E – [Other](#)
 - ☐ Attachments
- ☒ Tender Offer Form
- ☒ Tender Envelope
- ☐ [Additional Items](#)

Date:

[Issuing Office](#)

File:

[Location of Office](#)

Please ensure that your package is complete.

Tender Notice - Single Contract Example



Invitation to Tender Notice for Tree Planting Project #50-00824

Sealed tenders for the planting of 59,000 trees on 42 ha in the vicinity of Thynne Creek will be received by the Merritt BC Timber Sales Office, Timber Sales Manager, Kamloops Business Area, Bag 4400, Merritt, B.C., V0K 2B0, no later than 2:00 PM local time, April 26, 2003, at which time all tenders will be opened in public. A mandatory site viewing is scheduled for April 15, 2003, leaving at 9:00 AM from the Merritt BC Timber Sales Office. Tenders must be submitted in accordance with the terms and conditions specified in the tender package. The lowest priced or any tender will not necessarily be accepted. This solicitation is subject to the *New West Partnership Trade Agreement* and Chapter 5 of the *Agreement on Internal Trade*.

To obtain further information or a tender package, if tender packages are not available electronically from this location, please contact John Kreighoff, Silviculture Officer, at telephone 378-8468, or facsimile 378-8481.

If the Ministry posts any addendum to the Tender Documents it will be made by issuing an addendum:

- a) to all registered holders of any hard copy packages obtained from the Ministry; and/or
- b) to the BC Bid® website at <http://www.bcbid.ca>. Bidders are strongly encouraged to select "Send Me Amendments" that is included as an option on the Opportunity Notice published on BC Bid®. By selecting this option a registered Bidder will be automatically notified of any amendment that may be issued. Bidders that are not registered with BC Bid® may register by selecting Start your e-Service, Supplier Registration on the BC Bid® home page, www.bcbid.ca. Bidders who do not register with BC Bid® are solely responsible to continually monitor the BC Bid® website on an ongoing basis to keep themselves informed of any addendum.

Timber Sales Manager
Merritt BC Timber Sales Office

Tender Notice - Multiple Contracts Example



Invitation to Tender Notice for Silviculture Contracts

Sealed tenders for the following silviculture contracts will be received by the Merritt BC Timber Sales Office, Timber Sales Manager, Kamloops Business Area, Bag 4400, Merritt, B.C., V0K 2B0, no later than 2:00 PM local time, April 26, 2003, at which time all tenders will be opened in public.

- **P2003K06-04:** Planting 59,000 trees on 42 ha - Thynne Creek. No conducted site viewing.
- **P2003K06-05:** Planting 192,000 trees on 161 ha - China Creek. Site viewing on April 14, 2003, leaving at 9:00 AM from the Merritt BC Timber Sales Office. Attendance is not mandatory.
- **SR2003K06-15:** Blade scarification/ windrows on 200 ha - Young Creek. Site viewing on April 15, 2003, leaving at 9:00 AM from the Merritt BC Timber Sales Office. Attendance is mandatory.

Tenders must be submitted in accordance with the terms and conditions specified in the tender package. The lowest priced or any tender will not necessarily be accepted. This solicitation is subject to *New West Partnership Trade Agreement* and Chapter 5 of the *Agreement on Internal Trade*.

To obtain further information or a tender package, if tender packages are not available electronically from this location, please contact John Kreighoff, Silviculture Officer, at telephone 378-8468, or facsimile 378-8481.

If the Ministry posts any addendum to the Tender Documents it will be made by issuing an addendum:

- a) to all registered holders of any hard copy packages obtained from the Ministry; and/or
- b) to the BC Bid® website at <http://www.bcbid.ca>. Bidders are strongly encouraged to select "Send Me Amendments" that is included as an option on the Opportunity Notice published on BC Bid®. By selecting this option a registered Bidder will be automatically notified of any amendment that may be issued. Bidders that are not registered with BC Bid® may register by selecting Start your e-Service, Supplier Registration on the BC Bid® home page, www.bcbid.ca. Bidders who do not register with BC Bid® are solely responsible to continually monitor the BC Bid® website on an ongoing basis to keep themselves informed of any addendum.

Timber Sales Manager
Merritt BC Timber Sales Office

Tender Notice - Charge for Tender Packages Example



Invitation to Tender Notice for Road Construction Project #50-5006

Sealed tenders for approximately four kilometres of road construction on the Ponderosa Forest Service Road will be received by the District Manager, Ministry of Forests, Lands and Natural Resource Operations, Rocky Mountain Forest District, 1902 Theatre Road, Cranbrook, B.C. V1C 4H4, no later than 2:00 PM local time, April 16, 2003, at which time all tenders will be opened in public. A mandatory site viewing will be held April 6, 2003. Interested parties are to meet on site at 11:00 AM.

Tender packages will not be made available electronically from this location. A tender package may be viewed free of charge in the office or a tender package may be purchased at a cost of \$25.00 (HST included) after March 16, 2003 from the following ministry offices: Rocky Mountain Forest District, and Southern Interior Forest Region, 515 Columbia Street, Kamloops, B.C.

Tenders must be submitted in accordance with the terms and conditions specified in the tender package. The lowest priced or any tender will not necessarily be accepted. This solicitation is subject to *New West Partnership Trade Agreement* and Chapter 5 of the *Agreement on Internal Trade*.

If the Ministry posts any addendum to the Tender Documents it will be made by issuing an addendum:

- a) to all registered holders of any hard copy packages obtained from the Ministry; and/or
- b) to the BC Bid® website at <http://www.bcbid.ca>. Bidders are strongly encouraged to select "Send Me Amendments" that is included as an option on the Opportunity Notice published on BC Bid®. By selecting this option a registered Bidder will be automatically notified of any amendment that may be issued. Bidders that are not registered with BC Bid® may register by selecting Start your e-Service, Supplier Registration on the BC Bid® home page, www.bcbid.ca. Bidders who do not register with BC Bid® are solely responsible to continually monitor the BC Bid® website on an ongoing basis to keep themselves informed of any addendum.

To obtain further information, please contact Joe Smith, Engineering Officer, at telephone 378-8468, or facsimile 378-8481.

District Manager
Rocky Mountain Forest District

Information to Bidders Example



Information to Bidders for **insert project name**

Overview of the Work/Service Required

Program Information

Work Excluded

Site Conditions

Known Field Safety Hazards on this Contract

Ministry staff and contractors, in the course of planning and developing this project, have identified the following known field safety hazards associated with this project. Note this list does not identify routine safety hazards associated with forestry operations:

- No "Known" safety hazards *OR*
- (list hazards)

Contractor Safety Program and Prime Contractor Responsibilities

The Successful Bidder will be designated the Prime Contractor for this contract and must bid accordingly. Any prospective bidder classified as an Endorsed New Entrant by BC Forest Safety Council will not be considered eligible to bid.

Where the successful Contractor is an Endorsed New Entrant by BC Forest Safety Council, the Ministry will not consider the successful Contractor to be qualified to function as a prime contractor and the successful Contractor will be unable to subcontract in any manner that will create a multiple-employer workplace.

The Successful Bidder will be designated the Prime Contractor for this contract and must bid accordingly and meet the bidder eligibility stated in the Conditions of Tender.

Bidders and the Successful Contractor must plan to maintain and implement a safety program as described under the *Workers Compensation Act* and its regulations, and, for BC Timber Sales, the SAFE Companies standards.

Bidders must be aware of the Safety Conditions Schedule and the Prime Contractor Agreement attached to the contract agreement.

A Ministry Representative may ask to examine the safety program and may ask for evidence to support the implementation of this safety program as part of the contract administration.

Ministry Staff Do Not Direct Operations

Ministry employees (Ministry Representatives) do not direct or supervise the contractor or the contractor's workers. The Ministry will set out the contract standards and required outcomes as well as any changes to contract conditions as work progresses.

Obligation to Report Unsafe Conditions or Practices

The *Workers Compensation Act*, Occupational Health and Safety Regulation 3.10 requires that any person (including Ministry of Forests, Lands and Natural Resource Operations staff) report any observed unsafe conditions or practices to the person in charge of the workplace. Ministry staff will do this in the course of their work on the contract area should they come across such conditions or practices.

Site Viewing/Information Meeting

Information on whether a site viewing or information meeting is applicable to this tender call can be found in the Conditions of Tender.

Contract Term/Work Schedule

The term of the contract will be from to .

The successful Contractor shall be required to have a pre-work meeting with the Ministry Representative to review the contract prior to commencement of the work. Any subjects discussed and decisions made at the pre-work conference shall form an integral part of the contract.

Option-to-renew

A continuous service without further tendering is desired. Therefore, the contract being tendered contains an "option-to-renew" clause. Refer to the Conditions of Tender for further information.

Contractor Invoicing

An invoice must identify the contract it pertains to.

The Province will pay any applicable taxes payable by it under law or agreement with the relevant taxation authorities. Invoices must show the calculation of any applicable HST to be paid as a separate line item for the Billing Period(s).

Payment Policy

Invoices and progress payments are not usually paid before 30 days from the date the Ministry receives the invoice, or the date the Ministry Representative authorizes payment, whichever is the latter. However, every effort is made to pay accounts between 30 to 40 days, maximum 60 days.

The *Financial Administration Act* does not permit interest payments on progress payments, performance security deposits or holdbacks, until the 61st day after the date the money becomes due. The due date is calculated from the date the Ministry receives the invoice or the Ministry authorizes payment/release (whichever is the latter), to the date the Ministry of Finance prints the cheque. Interest rates are set by the Office of the Comptroller General. Interest claims of less than \$5 are not payable.

Early Payment Discount

The government is not legally obligated to take advantage of a payment discount offered on an invoice. However, if the discount is enough to offset the government's cost in processing early payment (interest costs plus the incremental cost of special processing), the Ministry will normally consider it. Contractors interested in providing an early payment discount should discuss the matter with the Ministry Representative.

Discounts for early payment will not be considered in the evaluation of bids. Bids shall be based on the Ministry payment policy specified above.

Direct Deposit

In order to reduce mail time in the payment process, contractors may be registered with the Provincial Treasury. Payment will then be deposited directly to the contractor's bank account. Contact the finance section of the tendering office for information and/or application for registration. New applications require four to six weeks to process.

Bidders' Dispute Resolution

If a problem should occur during this tender call, it should be resolved informally with the Ministry Representative named in the invitation to tender. If the bidder is not satisfied with the outcome at this stage, or they prefer to bypass the informal route, they may engage the formal vendor complaint review process.

Formal complaints concerning a competitive process or a pending or awarded contract, or other procurement process may be submitted by the bidder in writing at any time during the procurement process and up to thirty (30) business days after they have received notification from the ministry of the final outcome of the procurement process.

Complaints in the formal process are submitted on the ministry approved Vendor Complaint Form. This ministry specific form is available to the general public through the Ministry of Labour, Citizen's Services and Open Government, Procurement Service Branch, BC Bid website located at <http://www.bcbid.gov.bc.ca/open.dll/welcome>.

Disputes occurring during the performance of the work/service will be governed by the dispute resolution terms and conditions of the Agreement.

Forest Sector Safety Requirements

Safe Certification Requirement for BCTS Contractors

As per the Conditions of Tender, BC Timber Sales (BCTS) requires all bidders to be aware of the safe certification requirements in order to be eligible to bid.

All bidders must also be aware of the Safe Certification Requirements schedule attached to the contract agreement.

Please refer to the following BCTS and BC Forest Safety Council websites for more information:

<http://www.for.gov.bc.ca/bcts/safety/>

<http://www.bcforestsafe.org/>

Hand Falling Operations

Effective April 1, 2013, all forestry and non-forestry related activities that include or have the potential to include hand falling, requires the Contractor to designate a Falling Supervisor. Bidders should refer to the Safety Conditions Schedule attached to the Agreement and bid accordingly.

Lobbyist Registration Act

It is the contractor's responsibility to abide by all applicable laws. If the contractor falls within the parameters of the *Lobbyists Registration Act*, then it is the contractor's responsibility to make this determination and register if necessary.

Appendix M: Pre-Work Conference Checklist

Conference Date: _____

Contract/Project #: _____

Contractor Legal Name: _____

Contractor Representative: _____

Ministry Representative: _____

ITEMS CHECKLIST	Yes	N/A
GENERAL		
Formalize responsibilities of the ministry representative and/or inspector who will administer the contract on behalf of the ministry.	<input type="checkbox"/>	<input type="checkbox"/>
Formalize responsibilities of the contractor representative (<i>note:</i> if this person is acting on behalf of the contractor at this conference, ensure you have a signed authorization letter to this effect from the contractor).	<input type="checkbox"/>	<input type="checkbox"/>
Confirm roles and responsibilities and names of contractor's team (key persons).	<input type="checkbox"/>	<input type="checkbox"/>
Review communications plans.	<input type="checkbox"/>	<input type="checkbox"/>
Review work plan/construction schedules (startup dates and priority) and deadline dates (i.e., milestone dates) and frequency and format of interim reports (list may be required).	<input type="checkbox"/>	<input type="checkbox"/>
Confirm the number of workers, forepersons, equipment requirements, etc. to be employed to meet the minimum production rate or completion date(s).	<input type="checkbox"/>	<input type="checkbox"/>
Confirm the subcontractors designated by the Contractor. NOTE: under Major Works Contract the subcontractors are those submitted as an attachment to the Contractor's tender form, and accepted by the Province at contract execution.	<input type="checkbox"/>	<input type="checkbox"/>
Where applicable, the work site should be toured to review work conditions, boundaries, access, or hazards.	<input type="checkbox"/>	<input type="checkbox"/>
Reaffirm requirement not to begin work prior to the start-up date and, where applicable, not before receipt of a Notice to Commence Work.	<input type="checkbox"/>	<input type="checkbox"/>
Review any permit requirements and whether the ministry or the contractor has the responsibility to obtain them.	<input type="checkbox"/>	<input type="checkbox"/>
Confirm arrangements for the provision of any ministry supplied materials, services, or equipment (e.g., ministry supplied tree seedlings, culverts, etc.).	<input type="checkbox"/>	<input type="checkbox"/>

Review the method of calculating payment, including any holdback provisions, and any charges or deductions that may result from non-compliance.	<input type="checkbox"/>	<input type="checkbox"/>
Remind the contractor that the ministry will monitor for compliance with WorkSafe BC regulations and is subject to cancellation upon significant or repeated infractions.	<input type="checkbox"/>	<input type="checkbox"/>
Explanation of the inspection procedures (initial, progress, re-inspections, and final).	<input type="checkbox"/>	<input type="checkbox"/>
Explanation of contract enforcement process, including progression to possible contract cancellation.	<input type="checkbox"/>	<input type="checkbox"/>
Review the dispute resolution process as per the contract.	<input type="checkbox"/>	<input type="checkbox"/>
Review provisions concerning disposition of securities.	<input type="checkbox"/>	<input type="checkbox"/>
Where applicable, reaffirm the contractor is to notify the public of work affecting them directly (i.e., road work, etc.), and to try to minimize any inconvenience (may include advertising in the media, signage, etc.).	<input type="checkbox"/>	<input type="checkbox"/>

SAFETY REQUIREMENTS

General

Confirm proof of WorkSafe coverage, including Personal Optional Protection as applicable.	<input type="checkbox"/>	<input type="checkbox"/>
Advise that the ministry cooperates with and the Employment Standards Branch to monitor compliance the <i>Employment Standards Act</i> .	<input type="checkbox"/>	<input type="checkbox"/>
For silviculture work, bring attention to the <u>Compliance with Employment Standards Inspection Form</u> (FS776a and FS776b).	<input type="checkbox"/>	<input type="checkbox"/>
Advise that the ministry cooperates with WorkSafe to monitor compliance with safety and that all activities are to be conducted in a manner consistent with the Act and safe work practices, including first aid requirements, safe work conditions/procedures and personal protective equipment, procedures and communications in place for man check, signage, hazard awareness, etc.	<input type="checkbox"/>	<input type="checkbox"/>
Ensure Contractor is aware that any safety concerns that are within the control of the ministry should be brought to the attention of the Ministry Representative.	<input type="checkbox"/>	<input type="checkbox"/>
Review the requirement for an emergency response plan to be in place.	<input type="checkbox"/>	<input type="checkbox"/>
If contract is funded by BCTS, ensure contractors are aware of their responsibilities under the Safe Companies Program.	<input type="checkbox"/>	<input type="checkbox"/>
Ensure contractors are aware of their responsibilities for employee safety training, supervision, and reporting (bring attention to the Safety Conditions Schedule).	<input type="checkbox"/>	<input type="checkbox"/>
Ensure contractors meet the requirements for all safety equipment and emergency transportation.	<input type="checkbox"/>	<input type="checkbox"/>
Discuss known safety hazards and the methods the contractor will use to deal with unsafe work conditions such as snags, hazardous areas, weather, or wild animal problems, etc., including new hazards since advertisement.	<input type="checkbox"/>	<input type="checkbox"/>
Where applicable, a review of BCTS Environmental Management System (EMS) requirements (including the EMS schedules and completion of checklists).	<input type="checkbox"/>	<input type="checkbox"/>

Ensure the Contractor is aware, as per the <i>Wildfire Act</i> , that a person carrying out an industrial activity must “immediately carry out fire control and extinguish the fire, if practicable” on any fire within 1 km of their work site and the <i>Workers’ Compensation Act</i> states that any worker who may be called upon to fight a forest fire must receive firefighting training acceptable to the Workers Compensation Board and that training must be delivered on an annual basis.	<input type="checkbox"/>	<input type="checkbox"/>
Notice of Project		
Verifying the contractor has submitted the appropriate Notice of Project to WSBC. These forms are obtained through WSBC.	<input type="checkbox"/>	<input type="checkbox"/>
Multiple Employer Workplace (NOTE: Prime Contractor Agreement only executed where MEW exists)		
If the Contractor is being designated as the Prime Contractor, ensure the Prime Contractor Agreement (FS1354) is signed and ensure their role is understood.	<input type="checkbox"/>	<input type="checkbox"/>
Review contractual requirement should a multi employer work place (MEWP) come into existence, including explaining Prime Contractor functions and any considerations regarding any other contractors working on site.	<input type="checkbox"/>	<input type="checkbox"/>
Ensure the Contractor understands their function as Prime Contractor if they choose to subcontract and a MEWP is created and their requirement to execute the Prime Contractor Agreement or their cooperation with another designated Prime Contractor.	<input type="checkbox"/>	<input type="checkbox"/>
Review the Safety Conditions Schedule.	<input type="checkbox"/>	<input type="checkbox"/>
Provide contact information of known Prime Contractor, including copy of the Prime Contractor Agreement inserting the Contractor as an Affected Party.	<input type="checkbox"/>	<input type="checkbox"/>
Hand Falling Operations		
Ensure the Contractor understands the need for and requirement to designate a qualified falling supervisor.	<input type="checkbox"/>	<input type="checkbox"/>
Review the Hand Falling Supervisor qualifications (must know the hazards and the means to control the hazards and can instruct, direct and control workers, understands procedures and the documentation required in regards to manual tree falling operations).	<input type="checkbox"/>	<input type="checkbox"/>
Review Faller certification/qualifications	<input type="checkbox"/>	<input type="checkbox"/>
Confirm the need for a Falling Plan prior to commencement of falling operations.	<input type="checkbox"/>	<input type="checkbox"/>
Ensure Contractor is aware that where there are suspected danger trees that being considered for retention, a full assessment is required by a certified Wildlife/Danger Tree Assessor.	<input type="checkbox"/>	<input type="checkbox"/>
Camp Standards		
Highlight the requirement that <i>Employment Standards Act</i> and its Regulations and note that compliance is part of the contract;	<input type="checkbox"/>	<input type="checkbox"/>
Advise that copies of the Silviculture Workers Fact Sheet must be posted at the camp and copies provided to all silviculture workers (link to the fact sheet is found in the Camp Standards Schedule.	<input type="checkbox"/>	<input type="checkbox"/>
Advise that a copy of the Camp Standards Schedule must be permanently posted in a prominent place in the camp.	<input type="checkbox"/>	<input type="checkbox"/>

Advise that 72 hour notification must be given to the ministry representative, WorkSafe BC, and the local Health Authority prior to any camp being established (links to Health and WorkSafe are found in the Camp Standards Schedule).	<input type="checkbox"/>	<input type="checkbox"/>
Ensure Contractor is aware of their requirement to review the camp standards and plans and proposed location to ensure that the site is suitable considering local site parameters, other resource users, tenure holders, downstream impacts, First Nation concerns, and other factors.	<input type="checkbox"/>	<input type="checkbox"/>
As per the Operational Services Contract, provide Contractor with written approval to establish a temporary camp.	<input type="checkbox"/>	<input type="checkbox"/>

SIGNED by the Contractor or by its authorized Contract Representative:	
Name	Signature
SIGNED by the Ministry Representative:	
Name	Signature