

Guidance Document: Management of Utility Permits on the National Forests of New Mexico

Prepared By:

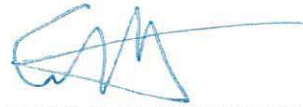
NM Rural Electric Cooperatives and National Forests of New Mexico Working Group

Version 1, May 2026

Signature Page for Support of the Guidance Document: Management of Utility Permits on
the National Forests of New Mexico



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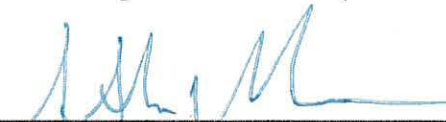
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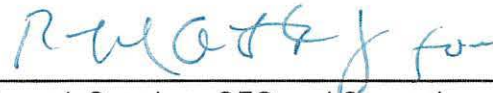
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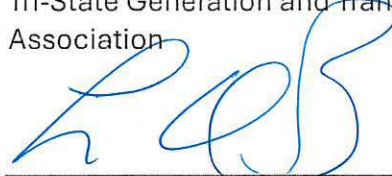
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*Endorsement of the Guidance Document: Management of Utility Permits on the National
Forests of New Mexico*

A handwritten signature in black ink, appearing to read "Laura F. McCarthy", written over a horizontal line.

Laura McCarthy, State Forester
New Mexico Energy, Minerals, Natural
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Introduction

The five National Forests in New Mexico are vital to the state's culture, economy, and rural communities. Rural Electric Cooperatives provide essential power, fiber, and utility services across these landscapes, but current conditions have limited the ability to work together effectively beyond individual special use permits. Declining forest health and increased fire risk make timely, coordinated infrastructure maintenance more critical than ever.

Historically, each forest issued special use permits locally, resulting in inconsistent standards, delays in routine maintenance approvals, and growing backlogs for both the Forest Service and cooperatives. This also occurred at a national level in the agency, leading to the issuance of Forest Service Handbook 2709.11, Chapter 80, in 2022. Continued challenges such as outdated maps, incomplete infrastructure inventories, and limited capacity have further constrained proactive planning and increased risks to service lines across the forests.

A statewide, cross-boundary approach is needed to bring consistency, improve efficiency, and support timely maintenance of the infrastructure most at risk from catastrophic wildfire. Enhanced coordination can improve knowledge-sharing, better leverage limited resources, and ultimately strengthen service delivery for rural New Mexicans who rely on both the Forest Service and Rural Electric Cooperatives.

Purpose

This document establishes a consistent, statewide approach for administering powerline utility special use permits on National Forest System (NFS) lands in New Mexico. While national guidance is provided, the New Mexico Forest Supervisors seek shared language, clear Forest Supervisor level interpretations, and shared best management practices to allow for consistent implementation by Line Officers, Program Managers, Permit Administrators, and special use permit holders. The intent is to provide consistent language for administration of current and future permits and for new Operating Plans that include Vegetation Management Plans (Title V of the Federal Land Policy and Management Act, 43 U.S. Code (USC) 1761-1772). Overall, the document is designed to resolve inconsistencies in permit management and expedite work on these systems.

Goal

The goal of this document is to offer a common, written interpretation of Forest Service Handbook direction—particularly NEPA, compliance requirements, and Activity Class descriptions—to support more effective, proactive management of cooperative-maintained powerlines across New Mexico. This will improve collective efficiency, success, and enable each forest to manage permits more strategically and proactively across units and boundaries. This guidance will be shared with all utility companies in the State of New Mexico and any adjacent National Forests who may also authorize permits to utility companies in New Mexico.

This document outlines the intent of the forest supervisors and utility companies to:

- Streamline environmental reviews to minimize timeframes, reduce inconsistencies, and maximize environmental analysis authorities and tools.
- Provide guidance on the rural electric cooperatives (power and/or fiberoptic capabilities) serving the rural communities of New Mexico while also remaining applicable for powerline company permits not associated with the New Mexico Rural Electric Cooperative Association (NMRECA).

This document is intended to be revised annually to align with the current need while ensuring new leaders are aware of their responsibilities and roles.

Guidance

The guidance in this document is to be used by the National Forests in New Mexico and the rural co-op electric cooperatives. This guidance is to be used in three ways:

1. In the interim of an existing or expired permit or development and acceptance of the associated vegetation management plans and operating plans.
2. To be used in the development and issuance of new permits and associated vegetation management plans and operating plans.
3. To be used in conjunction with other applicable laws and regulations and is providing additional clarity, intent from responsible officials, and to bring consistency to management of these permits across the State of New Mexico.

Framework

The guidance included in this document was developed within the following framework:

- [FSH 2709.11, Chapter 80](#) – Operating Plans and Agreements for Powerline Facilities is the baseline for this guidance document.
- Most powerline permits were authorized before the National Environmental Policy Act (NEPA) or other laws such as the Endangered Species Act (ESA) and National Historic Preservation Act (NHPA) were signed into law and are therefore not fully covered under previous environmental review.
- Access to power line facilities or infrastructure has not always been included in the special use permit.
- In mountainous terrain the powerlines are not located along existing roadways so there is generally no road access along the right of way and there may only be limited access to the right of way.
- Management of vegetation, and other resources, within a utility corridor is different than the general forest. The utility corridor, or right of way, has been previously disturbed and remain disturbed for vegetation management purposes to protect the surrounding forest, utility facilities and for human health and safety. Utility companies are bound by law to treat vegetation within their permitted right of way.
- Implementation of [Executive Order 14154](#) and [14146](#) have prioritized utility infrastructure projects and preparedness for security, therefore there should be no delays in approving the proposed work if all the information has been provided.
- Continued coordination and communication are key in addressing any work required within the permitted right of way for addressing hazards, routine maintenance, and vegetation management.
- Utilize all relevant CE categories and direction for relying on previous NEPA as provided in [7 CFR Part 1](#) when analyzing utility projects.

Forest Supervisors Intent to Forest Service Employees

The Forest Supervisors share the following intent with all forest employees who administer or support utility company management.

- Recommendations from permit administrators are consistent with the guidance included in this document.
- This guidance document will be used to help inform decisions related to utility company management. Line officers should consider:
 - Being timely in approving vegetation management projects especially where the risk of not treating an area and the threat from potential starts of wildfire may outweigh the risk of the impacts from treatment activities.

- Using the framework and guidance in this document when permit reissuances occur, or routine and non-routine maintenance activities are proposed within the permitted right of way, to do the minimally required surveys needed.

Working Group

This document was prepared by a working group consisting of representatives from all five New Mexico National Forests and National Grasslands (Cibola, Lincoln, Santa Fe, Carson and Gila) and representatives from individual rural co-ops across the State of New Mexico with service areas that cross these National Forests and National Grasslands. The group was facilitated by Carson National Forest FS Collaboration Staff Officer and NMRECA.

The working group identified several issues that will be addressed in this guidance document:

- Communication
 - Out-year planning
 - Decision authorities
- Powerline maintenance
- Hazards outside the ROW
- Capacity related to GIS and survey needs

The working group developed a consensus process for the guidance developed in this document.

- Consensus – Full or near-unanimous agreement among working group participants.
- Conditional Consensus – General agreement, contingent on specific unresolved issues or further review by the working group.
- No Consensus – Significant differences in viewpoints; included for information purposes in guidance document, with further deliberation needed by Forest Supervisors or rural co-op utility leadership.

This document is organized by the issues addressed by the working group and identifies if the guidance had consensus, conditional consensus, or no consensus. The parties responsible for implementing the guidance are also noted.

For example:

Communication – (Consensus, Forest Service and Utility Companies)

Guidance for Utility Permits

Communication

(Consensus, Forest Service and Utility Companies)

Communication is a key element for ensuring management of powerline facilities is consistent across the State of New Mexico, process is streamlined, and on-the-ground issues are reduced.

Contact List

- A contact list will be annually updated with the following information (Appendix A – Contact Lists):
 - o Forest Service personnel (Special Use Administrator, Lands Program Manager, Staff Officer, District Ranger, and Forest Supervisor) and utility company personnel (General Manager/CEO, Operations Manager/Superintendent and Information Officer). Other key personnel may be included, such as the Forest Public Affairs Officer, key fire contacts, and NMRECA staff.
- NMRECA will help to develop a clearinghouse with this information to be available and shared widely.
- Other agencies or critical contacts may be added to this list for additional coordination, such as New Mexico State Forestry, Bureau of Land Management, Regional Wildland Fire Chiefs, State Land Office, and Department of State Homeland Security and Emergency Management.

Organizational Structure, Roles and Responsibilities, and Decision Authorities

While all issues should be resolved at the lowest management level possible, it is important to understand who has decision authority among Forest Service and utility company personnel; understand the roles of these personnel; and what the organization structure is.

- Appendix B displays an organizational chart for both the Forest Service and utility companies and describes general roles and responsibilities, who has decision authority, and who to reach out to first to resolve issues.

Annual Meetings

One of the most important elements discussed by the working group is the commitment to further coordination with annual meetings.

Leadership Annual Meetings

- These meetings occur with higher level of leadership for the utility companies and Forest Service and can be organized by the NMRECA.
- The goal for these meetings is to address issues occurring at a State-Wide level.
- Meetings should be held in early spring (Feb/Mar) or fall (Oct/Nov).
- Potential agenda items:
 - o Landscape-level forest health issues
 - o Coordination on future vegetation management projects
 - o Review of this Guidance Document
 - o Update contact list
 - o Training courses which can include:
 - Forest Service giving overview of National Environmental Policy Act.
 - Utility companies giving an overview of their processes for funding, project development, and other basic information on how utility work is conducted.

Local-Level Annual Meetings

- Meetings involving local level Forest (Special Use Permit Administrator, Lands Program Manager, District Ranger) and utility company personnel. If the utility company has permits with multiple forests, then the meetings should include all forests.
- Goal of these meetings is to better understand planned work, local issues or concerns, and discuss opportunities including any vegetation management/fuels reduction projects.
- Meetings should be held in early spring (Feb/Mar) or fall (Oct/Nov).
- Potential agenda items:
 - o Project plans for the upcoming year (all known class activities)
 - o Fire season outlook
 - o High fire-risk areas
 - o Review of Forest vegetation projects and how they may overlay with utility corridors – finding opportunities to collaborate across other forest program of work projects.
 - o Road and trail work requests, road abandonment
 - o Public use of the permit area for closure and notification purposes
 - o Unauthorized use of NFS lands
 - o Public safety
 - o Review checklist of responsibilities
 - o Update contact list

- Update geospatial data needs, have a GIS specialist attend meeting to visualize projects in real-time.
- Review known cultural and threatened or endangered species habitat areas for up-coming projects
- Survey schedules for upcoming projects
- Training courses which can include:
 - Forest Service giving overview of National Environmental Policy Act.
 - Utility companies giving an overview of their processes for funding, project development, and other basic information on how utility work is conducted.
 - Review of fire prevention and suppression activities and restrictions during the fire season for different levels.

Pre-Proposal Meetings

The working group acknowledged that coordination before non-routine maintenance, vegetation management, activities not previously authorized under the special use permit (including addition of new access routes), or road maintenance/construction should be developed and discussed before submitting a SF-299 to the Forest Service. The pre-planning phase of project development is key before starting the environmental analysis under NEPA and may shorten approval timeframes. The goal of these meetings is to be successful in implementing each project in a timely manner and reduce the need for constant corrections during the review process.

- Pre-proposal meetings should occur when the utility company is aware of the need for the project/activity, which may occur before funding has been allocated.
- Meetings should include maps and geospatial data, description of project activities, and timelines.
- These meetings need to occur as early as possible, before a SF-299 is submitted to the Forest Service.

Annual Checklist

- Appendix C includes a checklist for permit administrators and utility companies that lists what they need to do on an annual basis that includes coordination steps and making sure things are addressed proactively.

Communication Response Times

To improve customer service and ensure projects are moving in a timely manner:

- All communication between utility companies and the Forest Service will have a required response time of two weeks. This can include a quick note or call clarifying

when a full response will occur. If either the Forest Service or co-ops do not hear back within two weeks, then they can communicate with the next level staff members.

Key Notifications

To improve communication on notices regarding access, fire restrictions, prescribed burning activities, forest closures, etc.,

- The Forest Service will add utility company contacts to the general notification email list, managed by the Public Affairs Officer, so notifications about prescribed burning activities, wildfire, or forest closures are shared.

Powerline Maintenance

(Consensus, Forest Service and Utility Companies)

This section presents clarifications and additions to FSH 2709.11, Chapter 80, intended by the working group to ensure consistent and accurate use of the regulations.

Definitions

The following clarifications and additions are applicable to the definitions outlined in FSH 2709.11, Chapter 80 (Chapter 80).

Access Road or Trail

Additional context has been added to this definition. Some access roads and trails are not included in current permits, are not being maintained or are closed with barriers (e.g. berms or gates) to prevent public use, yet these roads may still be needed for access. Road use by utility companies includes:

- Access by roads and trails is needed to address emergencies.
- Roads needed for yearly inspections, routine work, and the operation and maintenance of powerline facilities should be documented in the permit to the best of the co-op's ability and updated as necessary.
- Roads or trails needed for non-routine work or one-time use should be evaluated as part of the specific project or emergency repair. Road use agreements may be required if road maintenance or improvement work occurs on National Forest System roads.
- New access roads or trails may be necessary if the original point of access has become overgrown or blocked.

Hazard Tree

With changing ecological conditions, addressing all hazard trees may become impractical when hazards occur at a broader, landscape scale. Clarifications have been added to the definition to specify that hazard trees are identified under normal conditions. It was also noted that rural electric cooperatives do not generally have licensed arborists; however, they do have staff qualified to recognize hazard trees. Therefore, references to specialists certifying a hazard tree were removed from the definition. Additions to the definition are underlined.

For purposes of vegetation management for powerline facility, any tree, brush, shrub, other plant, or part thereof, hereinafter “vegetation” (whether located on NFS lands inside or outside the linear right-of-way for the powerline facility), that has been designated, prior to failure, by the owner or operator to be:

- 1. Dead; likely to die or fail before the next routine vegetation management cycle; or in a position that, under normal geographical or atmospheric conditions, could cause the vegetation to fall, sway, or grow into the powerline facility before the next routine vegetation management cycle.*
- 2. Likely to cause substantial damage to the powerline facility; disrupt powerline facility service; come within 10 feet of the powerline facility; or come within the minimum vegetation clearance distance as determined in accordance with applicable reliability and safety standards and as identified in the special use authorization for the powerline facility and the associated approved operating plan or agreement.*

Powerline Facility Maintenance

Clarity was needed to address situations where changing environmental conditions cause routine or non-routine work to be reprioritized as emergency work.

- Routine or non-routine maintenance activities may become immediate or unplanned maintenance due to changed environmental, geologic, or atmospheric conditions. Forests should ensure timely response to project notifications so the issue can be resolved quickly.*

For example, repairing broken strands of conductors or overhead neutral wire (considered non-routine maintenance), but the fire season outlook shows a high likelihood of severe fires the maintenance activity may be deemed an ‘emergency’ by the company to prioritize addressing the issue faster than a normal routine or non-routine maintenance schedule. Implementation of these activities may not be on a timeline meeting the definition of ‘emergency’, but the Forest Service should recognize the importance of moving these

projects forward in a timelier manner than non-routine maintenance activities. There may be extenuating circumstances where the rural electric cooperative may at times deem these activities as an “emergency” and will coordinate with the Forest Service accordingly.

Reliability Standard

Clarify in the definition that the New Mexico rural co-op utility companies have a reliability standard from RUS, not only NERC.

- *Rural co-op utility companies have a reliability standard as outlined by United States Agriculture Department, Rural Utility Service (RUS) guidelines. While not all rural co-op utility companies receive funding from RUS, they all follow RUS guidelines.*

Access

Along with clarifications regarding the Access Road or Trail (see above) additional guidance is needed to ensure that access is authorized and available in a timely manner for routine, non-routine, and emergency maintenance activities.

- Previously disturbed access routes that are closed to public use will be made available and opened for access as needed by the co-ops for emergency or short-term non-routine access. These routes may be re-closed once the work is completed.
- If no access is provided from roads or trails occurring on the landscape, new road or trail construction may be needed. This construction is not considered routine work and will be evaluated in NEPA.
- If activities include driving a 4x4, UTV, ATV, or any other rubber-tired vehicle that does not exceed the existing road prism on a previously disturbed access road, no additional surveys or analysis are required to authorize the activity. If road improvements or maintenance involving ground-disturbing activities are needed, coordination with the permit administrator is required. The permit administrator will work with the line officer to determine if and what additional analysis or compliance requirements may be necessary.

The long-term goal for addressing access is to document via GIS all the access routes needed and authorize those in the permit. Access roads will be documented during every powerline inspection, which occurs every seven to ten years. Until that information is available, access along MVUM and non-MVUM roads will be authorized without further survey or environmental review, as noted above.

Class Activities

Class Activities as defined in Chapter 80 were clarified and are shown in *italics and underlined* or are ~~struck out~~ in the original Chapter 80 language. These clarifications were added to bring more consistency in how the examples are defined in the Class Activities and to streamline routine maintenance where appropriate.

Class A Activities

Class A includes routine activities that are deemed by qualified Forest Service specialists to involve minimal or no ground disturbance or impacts on vegetation inside and outside the linear right-of-way for the powerline facilities and that do not require additional environmental analysis or consultation for listed endangered or threatened species and cultural and historic resources. Examples include, but are not limited to, *general access to powerline facilities for inspections, mapping, use of drones, and replacement of some facility components that only require rubber-tired vehicles (4x4, UTV, ATV, etc.) and are within the right of way.* ~~mapping and inspections of poles, conductors, and other structures where large equipment, helicopters, or drones would be involved.~~ Class A activities may be restricted *through Best Management Practices (BMPs)* during certain times or under certain conditions to prevent adverse environmental, cultural, or species or habitat impacts.

Class B Activities

Class B includes routine activities *(such as, vegetation management, routine powerline facility maintenance, routine maintenance of access roads and trails)* that are deemed by qualified Forest Service specialists to involve minimal ground disturbance and impacts on NFS lands inside and outside the linear right-of-way for the powerline facilities ~~and that do not~~ *may* require additional environmental analysis or consultation for listed endangered or threatened species and cultural and historic resources, *as determined at the project-level.* Examples *of activities with minimal ground disturbance* that support the project include but are not limited to *those that create new disturbances outside the permitted right of way, such as clearing existing road prisms, preparing staging areas for equipment or removal of barriers along access roads and re-installing them.* ~~routine vegetation management, routine powerline facility maintenance, routine maintenance of access roads and trails and NFS roads and NFS trails, and routine repair or replacement of fiber optic cable.~~

Pole replacements

Pole replacements in Chapter 80 are defined as routine maintenance but involve ground disturbance. To facilitate timely responses to these types of projects and bring consistency in how this work is analyzed, the working group developed a definition to further clarify when pole replacements require additional environmental analysis or survey.

If pole replacement activities occur within 15 feet of the current pole, and do not occur within a known cultural site or threatened or endangered species habitat, then no further survey or environmental review will occur because the area has been previously disturbed. Pole replacements may include the change to more modern or safe materials, such as changing a wood pole to a metal pole or using a larger taller pole; this change will not require additional environmental analysis.

If pole replacement activities occur beyond 15 feet of a current pole, replacement requires different equipment (larger tracked vehicle), are within a known cultural site or threatened or endangered species habitat, access roads are required, or there is a requirement for pads or additional support locations for the equipment that lead to ground disturbance, then these projects may require surveys or environmental analysis.

Communication for Class B Activities

Any proposed routine maintenance that may involve ground disturbance should be reported to the permit administrator. The permit administrator will consult with resource specialists and advise the District Ranger on the type of activity, whether it falls within threatened or endangered species habitat, known cultural sites, designated areas, or other areas of possible resource concern, and the District Ranger will decide whether further survey or environmental analysis is needed. The default is that all Class B activities are routine and just proposing these activities with ground disturbance should not automatically imply surveys or additional environmental review needs to occur.

Class C Activities

Class C activities involve new, changed, or additional uses or areas under 36 CFR 251.61. Due to their complexity, impacts, and scope, Class C activities will typically require additional environmental analysis and consultation for listed endangered or threatened species and cultural and historic resources. Examples include but are not limited to new construction, rerouting of powerline facilities, and refurbishment or replacement of powerline facility components such as conductors, ground wires, and fiber optic cable; non-routine powerline facility maintenance; vegetation treatments outside the linear right-of-way for a powerline facility, this may also be determined as an emergency under Class D depending on circumstances; road and trail construction and reconstruction, which refers to cross-country travel or construction of a new road, not the use of existing road footprints (MVUM or non-MVUM); non-routine road and trail use and maintenance, such as installation of drainage features, fences, gates, or signs; and installation of fiber optic cable on powerline facilities.

Hazards Outside the Right of Way

(Consensus, Forest Service and Utility Companies)

As noted in the Annual Meetings section of Communication, there are opportunities for the utility companies and Forest Service to work together to address the landscape-scale forest health issues that are leading to increasing hazards to powerline facilities.

To clarify how to address material left after treating hazards outside the right of way:

- Hazard trees – when one or several trees are removed as a hazard, material can remain on the landscape. Bucking and scattering is preferred if it is safe to do so with the material.
- Larger-scale vegetation treatments – removal of more than a handful of trees outside the right of way requires coordination with the Forest Service on how the material can be removed. This material cannot be left on-site, as it increases fuel loads. Options for removal of material can include, but are not limited to, public fuelwood opportunities, decking, piles, timber sales. Design criteria and implementation will be compliant with Forest Service resource needs at the project scale.

Capacity related to GIS and survey needs

(Consensus, Forest Service and Utility Companies)

This issue was raised due to some utility companies not having GIS specialists on their staff, or the limited capacity Forest Service GIS staff have, to help utility companies with GIS. This is similar for wildlife and heritage needs, where Forest Service staff have limited capacity to conduct surveys.

Forest Service requirements for GIS data can be found in Appendix D. Permit administrators should be consistent in how they review GIS data that is received and be transparent with the utility companies if the information is not received properly.

Utility companies can also find some Forest Service data on the FS Geodata Clearinghouse located [here](#).

Future opportunities to help address these issues include:

- In yearly local-level annual meetings and pre-planning meetings, have a Forest Service GIS specialists attend to run GIS in real-time. Include wildlife and heritage specialists as well so they can share what they know about the project area (known cultural sites, threatened and endangered species habitat, etc.).

- Utility companies continue to find funding opportunities to update their GIS information for all facilities and share that information to update permits.

Appendices

Appendix A – Contact List Forest Service and Utility Companies

Appendix B – Forest Service Organizational Chart and Roles and Responsibilities

Appendix C – Forest Service Permit Administrator Checklist

Appendix D – Forest Service GIS Mapping Requirements

Appendix A – Contact Lists

Forest Service Contact List

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Information will be updated on a yearly basis by the permit administrators for the Forest Service and the POC for individual utility permit holders.

Name	Position	Email	Phone
Carson NF			
James Duran	Forest Supervisor	james.d.duran@usda.gov	575-779-3114
Eric Garner	Public Services Staff Officer	eric.garner@usda.gov	907-209-1199
Vacant	Lands Program Manager		
Amy Simms	District Ranger – Questa RD	amy.simms@usda.gov	575-770-4003
Michael Lujan	District Ranger – Camino Real RD	michael.lujan@usda.gov	575-776-4909
Angie Krall	District Ranger – El Rito RD	Angela.Krall@usa.gov	575-377-5153
Lesley Hay	District Ranger – Tres Piedras RD	Lesley.Hay@usda.gov	505-241-0885
Jim Eaton	District Ranger – Jicarilla RD	william.eaton@usda.gov	505-362-4754
Carson Dispatch	Use for emergencies		575-758-6355
Cibola NF			
Heidi McRoberts	Forest Supervisor	heidi.mcRoberts@usda.gov	505-346-3900
Christa Osborn	REALM Staff Officer	christa.osborn@usda.gov	505-346-3871
Richard ‘Wayne’ Wilhelm	Reality Specialist Special Uses Permit Administrator	richard.wilhelm@usda.gov	505-346-3842
Gila NF			
Camille Howes	Forest Supervisor	Camille.Howes@usda.gov	
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Santa Fe NF			
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Jessica Dunn	Public Services Staff Officer	jessica.dunn@usda.gov	505-328-4357
Justin Mapula	Lands Program Manager	justin.mapula@usda.gov	505-438-5373

Name	Position	Email	Phone
Santa Fe Dispatch	Use for emergencies		505-438-5600

Utility Cooperatives Contact List

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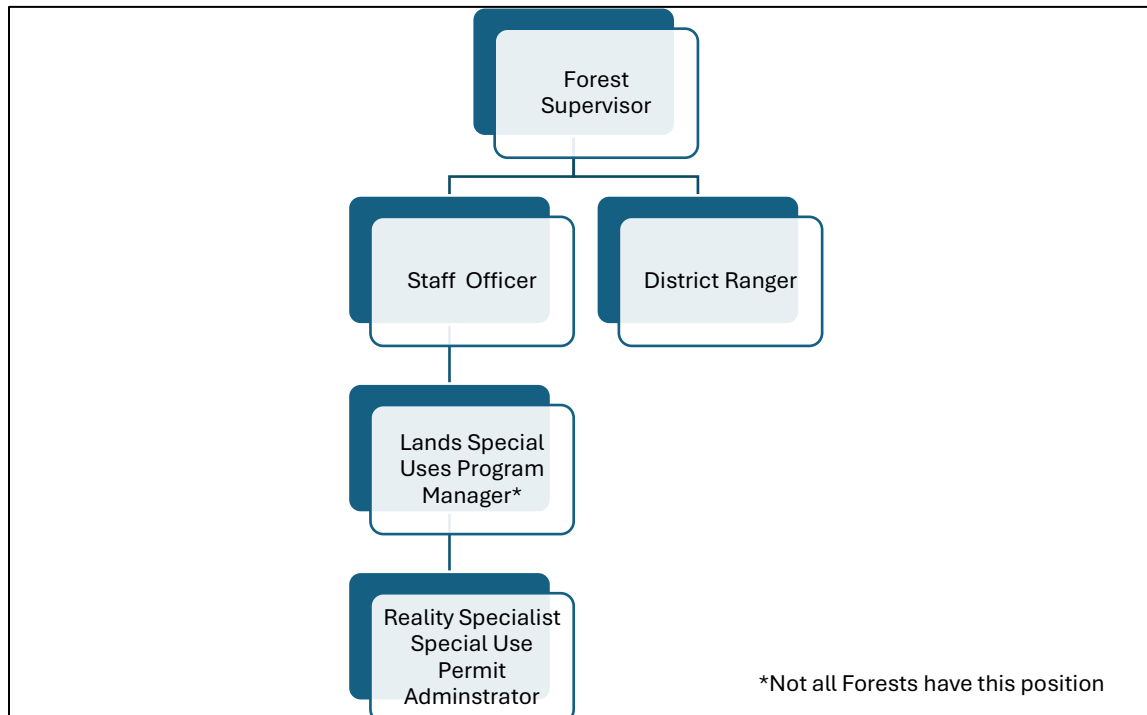
Information will be updated on a yearly basis by the New Mexico Rural Electric Cooperative Association (NMRECA).

Name	Position	Email	Phone Number
Jemez Mountain Electric Cooperative		Associated National Forests: Carson, Santa Fe	
Joseph Sanchez	CEO	jlsanchez@jemezcoop.org	Cell:505-235-8041 Desk:505-753-2105
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Kit Carson Electric Cooperative		Associated National Forest: Carson	
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Richard Martinez	COO	rmartinez@kitcarson.com	Cell:575-613-0619 Desk:575-758-2258
Northern Rio Arriba Electric Cooperative		Associated National Forest: Carson	
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La Plata		Associated National Forest: Carson	
Continental Divide Electric Cooperative		Associated National Forest: Cibola	
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Sierra Electric Cooperative		Associated National Forests: Cibola, Gila	
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Appendix B - Forest Service Organizational Chart for Lands Special Uses and Roles and Responsibilities



Forest Supervisor – Is the responsible official who authorizes special-use permits for electric powerline and distribution facilities on National Forest System lands when those permits have a 30-year term. They are the signatory for all Powerline permits, administrative action letters, and environmental analysis documents. They supervise the Staff Officer and District Ranger and may be contacted if there are concerns or issues at a highest level.

District Ranger – Is the responsible official for the district in which the use occurs. The Forest Supervisor may want District Rangers to be involved with relationship-building and responsible for the day-to-day management of the permitted use, if occurring on their district, and helps address issues at the local level for lands special uses. But the Forest Supervisor has the final decision authority for those permits. Not all District Rangers will be involved with lands special use permits; this is dependent on the Forest Supervisor direction.

Staff Officer –Provides program oversight to the lands special uses program and supervises the Lands Program Manager or Special Use Administrator at the forest-level. Brief Forest Supervisor on issues and recommendations, works with Special Use Administrator to build relationships with permit holders and bring consistency of the program across the Forest.

Lands Program Manager – Not all Forests have this position in their organization. This position oversees the lands program at the Forest-level and is responsible for managing lands permits, such as utilities. Provides recommendations to the Staff Officer and Forest Supervisor to address issues or concerns. Maintains a relationship with permit holders.

Special Use Permit Administrator – (This position may also be known as a Resource Specialist). This is the first contact for issues or questions regarding lands special use permits. They are responsible for managing and administering lands permits, providing guidance on permit questions or actions authorized under the permit. They are knowledgeable about the details of permits and can provide information to permit holders. Provides recommendations to the Staff Officer, District Ranger, and Forest Supervisor to address issues or concerns. Maintains a relationship with permit holders.

Appendix C – Guidance Document Checklist

This appendix includes several checklists to be used by Forest Service and utility company staff to help implement guidance in this document. Responsibilities for completing the tasks are outlined, as well as things to consider when working on individual projects. These checklists may be updated when needed to add clarity and remain consistent with the guidance in this document.

Leadership Annual Meetings

Meetings should be scheduled in early spring (Feb/Mar) or fall (Oct/Nov).

NMRECA Responsibilities	Utility Company Responsibilities	Forest Service Responsibilities
Organize and schedule annual meeting	- Provide briefing on needed vegetation management projects along right of ways. - Update contact list - Provide training or overview of processes for out-year funding, project development, or other topics as needed - Review guidance document	- Provide briefing on current and future vegetation management projects. - Brief on landscape-level forest health issues - Update contact list - Provide training or updates on National Environmental Policy Act or other topics as needed - Review guidance document

Local-Level Annual Meetings

Meetings should be held in early spring (Feb/Mar) or fall (Oct/Nov).

Utility Company Responsibilities	Forest Service Responsibilities
- Include project managers and other personnel with knowledge of projects - Discuss and share up-coming project plans for the year (all activity classes) - Share details of any vegetation management projects needed outside of right of way and work on finding opportunities on implementation - Identify any road and trail work requests	- Organize the meeting - Include special use permit administrator, lands program manager, district ranger, fire, fuels, and other specialists in invitation to meeting - If utility company has permit on another forest, coordinate with that forest on this meeting - Share fire season outlook

Utility Company Responsibilities	Forest Service Responsibilities
• Identify high fire-risk areas • Update contact list • Review Appendix C of the guidance document • For upcoming projects, share GIS data • Provide training or overview of processes for out-year funding, project development, or other topics as needed	• Share up-coming vegetation projects, work on finding opportunities to collaborate on implementation • Plans for closures and notification process if closures occur • Identify any unauthorized uses occurring on NFS lands • Update contact list • Review Appendix C of the guidance document • Review up-coming project information, including maps and review any concerns specialists may have • Provide training or updates on National Environmental Policy Act, fire prevention and suppression activities and restrictions, or other topics as needed

Pre-Proposal Meetings

These meetings focus on coordination for non-routine maintenance (Class B and C Activities), vegetation management, activities not previously authorized under the special use permit, or road maintenance/construction activities.

Meetings should occur before a SF-299 is submitted to the Forest Service.

Utility Company Responsibilities	Forest Service Responsibilities
• Request meeting when project/activity is known, may occur before funding has been allocated • Provide project description and location (including maps and GIS data), include needed access, and equipment being used	• Work with utility company to schedule meeting • After consultation with the Ranger invite the specialists that they want to have participate in the meeting

Class B and C Activities Project Checklist

Special Use Administrators can use the following checklist to help determine if a project falls within a Class B or C Activity per the guidance document.

Project Name	Project POC
	Proponent Name
Project Description <i>(Provide a detailed description of all proposed project activities, summarizing the who, what, when, where, and how. Describe project objectives the nature and extent of vertical and/or horizontal ground disturbing activities, or the nature and extent of all proposed building/structure modifications. Include details such as what machinery/equipment will be used, how the project area will be accessed (via existing roads? off-road overland vehicle travel? on foot?), where equipment will be staged, where materials will be sourced and staged, etc).</i>	
Are the activities proposed considered routine, such as vegetation management, routine powerline facility maintenance, route maintenance of access roads and trails? ☐ Yes* ☐ No Are the activities occurring: ☐ Outside of right of way ☐ Inside of right of way* Will activities have minimal ground disturbance, such as, but not limited to, clearing existing road prisms, preparing staging areas for equipment or removal of barriers along access roads and re-installing them? ☐ Yes* ☐ No ➔ If all three boxes with an * are marked, then project is most likely a <u>Class B Activity</u> and <u>may</u> require additional environmental analysis. ➔ If 'No' boxes and 'Outside of right of way' box is marked than this is a <u>Class C Activity</u>	

Does the project include pole replacements? ☐ Yes* ☐ No

Will the poles be places within 15 feet of the current pole? ☐ Yes* ☐ No

➔ If 'Yes' boxes are marked, then this is a Class B activity

Are there known

Threatened or endangered species habitat ☐ Yes ☐ No*

Cultural sites ☐ Yes ☐ No*

Other resources impacted such as Wilderness, Wild and Scenic Rivers, Research
Natural Areas, other _____? ☐ Yes ☐ No*

Will project require larger tracked vehicles, new access roads (no road prism), or staging
areas/pads for additional support vehicles or equipment that have ground disturbance?

☐ Yes ☐ No*

➔ If 'No' boxes are checked then this is considered a routine maintenance project
and no further survey or environmental analysis needs to occur.

➔ If any 'Yes' boxes are checked then the project may require additional survey or
environmental analysis.

Line Officer Intent and Expectations for this project:

Ranger Signature:

Date:

Appendix D – Forest Service GIS Mapping Requirements

To streamline the proposal process and ensure that the Forest Service receives all relevant information, the following geospatial and mapping data is required to be submitted along with the SF-299. This information can also be found on the [Forest Service Communication Uses website](#).

- The Forest Service (FS) requires clear, understandable maps, data and supporting documentation. When submitting a proposal for new fiber optic lines on National Forest System (NFS) lands, three documents are required:
 - [Map of proposed improvements in PDF format](#)
 - Map must clearly show the following:
 - FS land ownership
 - FS roads
 - Public Land Survey System (PLSS) description, if applicable
 - Show Township/Range/Section grid on maps
 - Proposed line name and ID number, if applicable
 - Should correspond with attached spreadsheet (see below).
 - [Map Example Request](#) (pdf, 281 KB)
 - Vicinity Map, Aerial Map, and Topographical Map are recommended.
 - [GIS data](#)
 - The only acceptable formats for GIS data are:
 - An ESRI File Geodatabase
 - ESRI Shapefiles
 - A published feature layer in AGOL
 - *Submitted KMZ files (Google Earth) or other forms of mapping data will not be accepted.*
 - Attribute table of Fiber Optic GIS data should include:
 - Fiber Optic Line Name (if applicable)
 - Fiber Optic Line ID number (if applicable))
 - Location of line: Co-locating on existing overhead infrastructure or underground conduit, or new overhead infrastructure or buried
 - Length
 - Proposed width
 - Proposed depth

- If new poles are proposed, include this GIS data, labelled accordingly.
- If access is needed, include this area in the GIS data as a separate feature, labelled accordingly.
- Fiber Optic Projects Only: Spreadsheet
 - A spreadsheet should accompany and support your GIS data. The spreadsheet should show [Spreadsheet Fiber Optic Data Sheet](#) (15 KB):
 - National Forest Name
 - Each spreadsheet should be specific to an individual National Forest.
 - Ranger District Name
 - County Name
 - Proposed Fiber Optic Line Name (what does your company call it?)
 - Proposed Fiber Optic Line ID (Is there an ID number associated with the proposed line?)
 - Owner of improvement/Company Name
 - Is the proposed fiber optic line collocating on existing overhead infrastructure or in existing underground conduit, overhead on new infrastructure, or a new buried line?
 - If multiple, separate out into sub-sections
 - If co-locating on existing infrastructure, provide the name of the owner
 - Beginning terminus Lat/Long (decimal degrees)
 - Ending terminus Lat/Long (decimal degrees)
 - Estimated length of proposed fiber optic line (in miles)
 - Estimated length of proposed fiber optic line (in feet)
 - Proposed right-of-way width (in feet)
 - Depth of proposed fiber optic line if buried
 - Estimated area of impacts (in acres)
 - Legal land description of the entire route (PLSS or metes and bounds include meridian name).
- **How to Obtain Forest Service data:**
 - FS Geodata Clearinghouse can be found [here](#).
 - Recommended data sets to utilize are:
 - Surface Ownership Parcels
 - Public Land Survey System Townships
 - Public Land Survey System Sections
 - Public Land Survey System Quarter Sections

- National Forest System Land Units (Identify Forest)
 - Ranger District Boundaries (Identify Ranger District)
 - National Forest System Roads (shows all roads)
 - Motor Vehicle Use Map: Roads (shows all roads open to the public)
- For public road GIS data, please refer to the applicable public road entity (county or state).

