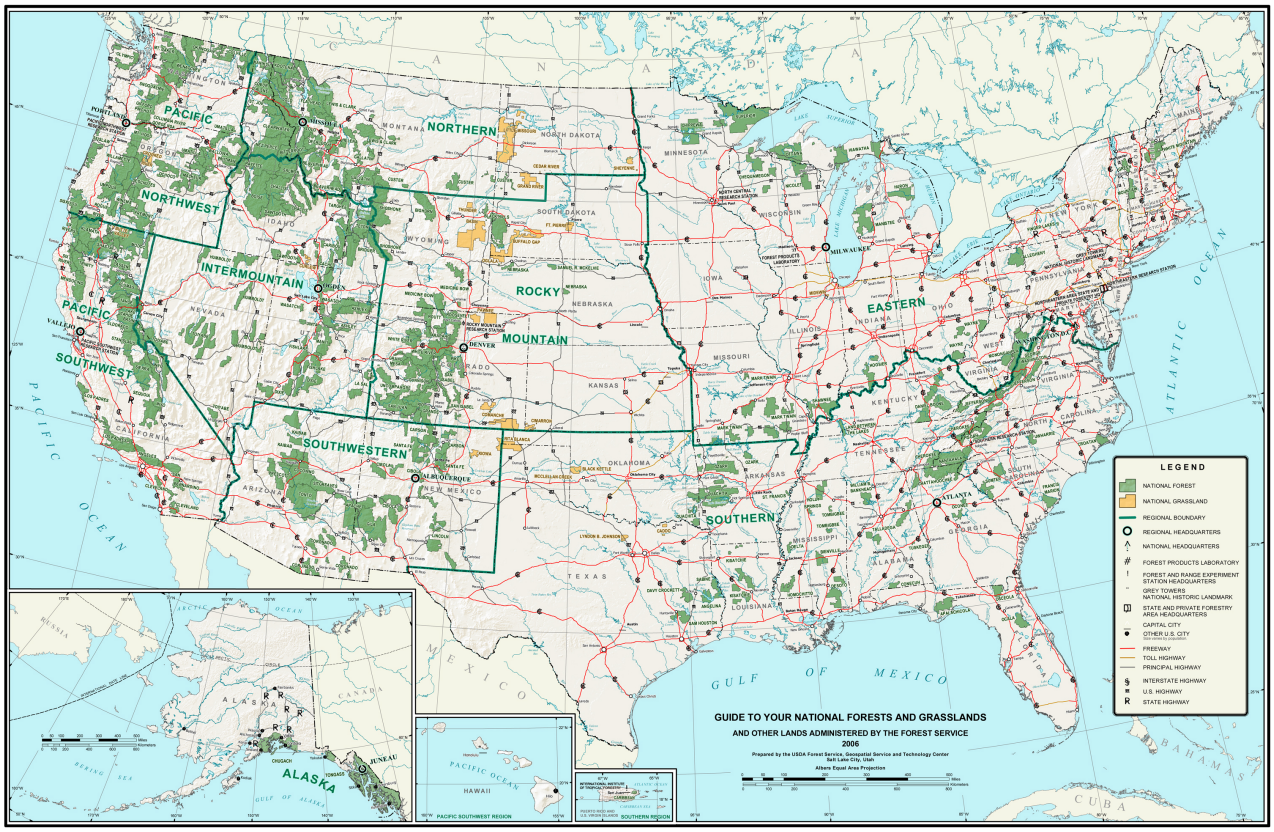
Public Participation:
Lessons Learned Implementing the 2012 US Forest Service Planning Rule

An Early Review of Lessons Learned on 12 National Forests



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The Center for Natural Resources & Environmental Policy accepts full responsibility for any omissions, errors, or misrepresentations in this report.

We hope that this report and project is the beginning – not the end – of harvesting and sharing lessons on public participation to implement the 2012 planning rule.

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Table of Contents

About this Report **4**

Synthesis of Lessons Learned **5**

Developing a Public Participation Strategy 6
Managing Logistics & Expectations 9
Informing & Educating the Public 11
Seeking Input & Advice from the Public 12
Using Professional Facilitators & Managing Effective Public Processes 13
Consulting Tribes 15
Coordinating with Local Governments 17

About this Report

Public Participation: Lessons Learned Implementing the 2012 US Forest Service Planning Rule synthesizes lessons learned by US Forest Service Interdisciplinary Team (IDT) leaders and process facilitators and mediators that have begun working on forest plan revisions under the 2012 planning rule. The primary purpose of the report is to begin to assemble in one place the collective wisdom and experience of Forest Service personnel and professional facilitators as they relate to public participation during the forest plan revision process.

One overarching lesson learned is that a national forest's approach to public participation should be thoughtfully tailored to the unique conditions and context of that individual forest. Accordingly, any lesson learned highlighted in this report is just that – a lesson learned from experience on one or more forests based on the unique circumstances facing that forest, including its historical use, local norms and culture, and administrative and management capacity. At the same time, every forest is moving through similar steps and processes, and there is a tremendous opportunity to learn from one another and begin to assemble and share a set of best practices and key ingredients for success. The key lies in critically analyzing each lesson shared and considering how a lesson from one forest planning process might inform the design and implementation of another forest's public participation plan.

This collection of lessons learned is – like each of the lessons themselves – best considered in the context of what it is and what it is not. It *is* an early and important look at lessons that can help an individual national forest craft its own public participation plan. Furthermore, it's a useful look at the collective issues, challenges, approaches, tools, and lessons that are playing out across multiple forests. It *is not*, however, a rigid prescription or blueprint for an individual national forest's public participation plan. Nor is it representative of the views of the broader community of stakeholders or of local, state, federal, or tribal governments. Finally, it is not a full collection of lessons spanning the entire plan revision process – as the breadth and depth of public participation experiences in the forest plan revision process moves forward, there will be a need to revisit and build upon these lessons.

We hope you find the report useful and informative.

Synthesis of Lessons Learned

The following synthesis of lessons learned about public participation under the 2012 planning rule emerged by looking across all 12 case studies, along with the three memos on tribal consultation, local government coordination, and the work of the National Advisory Committee. The lessons are organized by the following categories, which reflect in large part the general objectives of public participation:

1. Developing a Public Participation Strategy
2. Managing Logistics & Expectations
3. Informing & Educating the Public
4. Seeking Input & Advice from the Public
5. Using Professional Facilitators and Managing Effective Public Processes
6. Consulting Tribes
7. Coordinating with Local Governments

We want to emphasize, once again, that there is no "one size fits all" process for public participation and that these lessons will need to be considered in the context of a particular forest's culture, history, and capacity. In addition, these lessons are a beginning – not the end – of documenting and highlighting lessons learned. Given the experience to date, this report only tracks lessons and best practices through the very early stages of forest planning under the 2012 rule and only includes the input of those listed above. The process of learning as the planning process unfolds should continue on an ongoing basis.

As forest plan revisions continue across the National Forests, several of the people consulted in the process of preparing this report commented that it would invaluable to:

- Learn from the public participation experiences of other national forests;
- Provide opportunities for US Forest Service officials to periodically come together to exchange information, identify and document best practices, and discuss common concerns; and
- Use this information to build the capacity of US Forest Service officials and stakeholders to design and engage in more effective public participation processes.

We hope that this report and the body of work that went into it might catalyze a commitment to ongoing learning about fair, effective, and efficient public participation as it relates to forest planning under the 2012 rule.

Developing a Public Participation Strategy

According to the US Forest Service Handbook, "A public participation strategy should be developed at the beginning of the planning process. The responsible official is strongly encouraged to work with the public to develop a broadly supported strategy for public participation recognizing that public participation opportunities will likely evolve as more participants engage and the process develops. The type and exact timing of public participation opportunities may not be known at the beginning of the process."

As mentioned earlier, all 12 of the national forests included in this study prepared some type of public participation strategy. In some cases, the strategy was apparently never publicized because it changed so quickly. In at least one case, the Flathead National Forest, forest officials and the facilitation team worked with stakeholders to collaboratively develop the public participation strategy. The value of engaging stakeholders in helping design the public participation strategy is that they will not only have more ownership in the process, but also will become more sensitive to the mission, mandates, and constraints faced by the US Forest Service in facilitating public participation during the planning process.

At a minimum, according to the 2012 planning rule, public participation is required:

- During the assessment process;
- When developing a plan proposal;
- On a draft proposal and accompanying NEPA documents;
- At the beginning of the objection period for a new plan, amendment, or revision;
- To approve a final plan; and
- When reviewing the results of monitoring information.

Ten common lessons emerged from the case studies to help achieve these requirements and aspirations:

1. Design a clear road-map for the public participation process, including detailed schedules and opportunities to participate. Throughout the process, ask "what do we need from the public and why?" Be intentional.

2. Follow the guidance provided in the US Forest Service Handbook to:

    a. Facilitate participation during assessments -- the intent of public participation in the assessment phase is to "gather as much relevant information as possible to inform the plan development process.

Participation offers opportunities to share concerns about existing conditions and trends and perceptions of risks to social, economic, and ecological systems. Public participation in the assessment phase also supports the development of relationships with and among stakeholders and can begin to develop a joint understanding of current conditions and available data, and it offers an opportunity for feedback to support a strategic, efficient planning process."

b. Facilitate participation during development of plan components -- "The intent of public participation during plan development, revision, or amendment is to develop and identify zones of agreement relevant to plan components, where possible, acquire assistance in designing effective plan components, and obtain other feedback as needed. Topics that may be included in public participation include potential desired conditions, objectives, other plan components, and other plan content."

3. Build on existing and/or emerging collaborative groups as much as possible.

   a. To the degree that these groups include multiple stakeholders with diverse interests and have demonstrated their ability to engage and produce outcomes, it can save a lot of time and energy to assign them particular tasks and deliverables.

   b. It is important to keep in mind that relying on existing and/or emerging collaborative groups should be supplemented with opportunities for other people – that may not be part of a collaborative group – to provide input and advice.

   c. This strategy can augment the capacity of the US Forest Service and its facilitation team to mobilize and engage people that represent diverse interests and viewpoints.

   d. Established collaborative groups often have sufficient legitimacy and credibility to convene and sponsor public gatherings and thereby attract a larger, more diverse crowd.

4. Engage stakeholders in designing the public participation process, as demonstrated by the Sierra Cascades Dialogue and the Flathead National Forest.

   a. Consult with key stakeholders via "listening sessions" early on to identify key issues and to seek input and advice on the public participation process.

   b. Provide an opportunity for stakeholders and others to review and refine the public participation process by presenting a draft of the plan at an open public meeting (or perhaps even online).

5. Keep public participation plans (or road-maps) realistic; clearly define sideboards and constraints related to timeframe, budget, staff, and why some issues or topics may fall outside the scope of the planning process.

6. Use a variety of tools -- including teleconferences, web-based tools, and e-collaboration -- to inform and educate the public, and to seek their input and advice.

    a. Move beyond the use of "open houses" to present information, educate participants, and seek their input and advice.

    b. Teleconferencing and web-based tools such as Skype allow more people to participate without incurring travel costs, particularly people that live long distances from the meeting sites; for example, OurForestPlace is designed be a focal point for collaborative engagement in the virtual world. It allows stakeholders to be engaged in a transparent way, share ownership in the process and foster a community of learning to capitalize on shared knowledge.

    c. However, not every person interested in the national forest and/or the planning process will have access to high-speed internet service. E-collaboration should be designed to supplement, not replace, other forms of public information and engagement.

    d. Different strategies need to be used to reach different audiences (e.g., minority, rural, or under-served populations);

    e. Use "potlucks" or other ways to facilitate informal conversations; bring coffee and food to every meeting!

7. Make the public process fun; offer gifts and food at public booths to encourage citizens to learn about the planning process.

8. Recognize that the public participation and collaboration process should continue beyond the planning phase. This means that engagement mechanisms should be designed to facilitate ongoing dialogue.

9. Consider ways to measure the effectiveness of public participation and collaborative processes.

10. Build on the experience and expertise of professional facilitators and mediators, the International Association for Public Participation, and the US Institute for Environmental Conflict Resolution.

Managing Logistics & Expectations

The top ten lessons that emerge from the case studies relative to managing logistics and expectations – both internal and external -- are as follows:

1. Use project management principles to lay out the whole process from the beginning instead of going from step to step. This will help you "focus on the forest and the trees."

2. Dedicate a staff person to manage all of the public engagement and collaboration activities; it is next to impossible to expect the interdisciplinary team leader or any other member of the team to manage their workload along with coordinating the public participation process.

3. Take time to build the capacity of US Forest Service staff to engage in public participation, and for stakeholders to know how best to engage in the planning process (e.g., use a professional facilitator to design and lead an orientation/training workshop, or use one of the off-the-shelf programs provided by the International Association for Public Participation, the US Institute for Environmental Conflict Resolution, or the Collaborative Cadre).

4. Aspire to "proper pacing." Provide sufficient time for the public participation process to take place.

    a. In some cases, citizens and stakeholders complained that the pace of the planning process is "moving too fast."

    b. While the pace of the process is partially driven by the US Forest Service deadlines and other sideboards, it takes time to meaningfully engage the public.

5. Clarify and remind the public about the process, schedule, and constraints or sideboards of the plan revision. Most national forests are revising and updating their forest plans with limited resources and a limited timeframe of four years.

6. Emphasize early and often that final decisions have not been made prior to seeking input and advice from the public. Explain that citizen input and advice will influence the shape of the plan; then demonstrate how public input and advice was used to shape the plan.

7. Schedule public meetings, workshops, and other events at times that are most convenient for the public; be aware of what else is happening in the community and avoid competition with other social and public events.

8. Demonstrate the commitment of the US Forest Service to the public participation process by asking the Forest Supervisor or other decision-maker to participate in as many public meetings and community-based workshops as possible.

9. Engage US Forest Service staff in the design and implementation of the entire planning process.

    a. Build a sense of excitement and ownership in the process.

    b. Avoid staff turnover within the US Forest Service during the planning process since this erodes trust and confidence in the process and thus the outcomes.

    c. Be careful about imposing a planning process from the outside, whether that is from the national or regional office. Allow local US Forest Service officials, working with local stakeholders, to design and implement the process that best fits their circumstances.

    d. Given the amount of time you are asking citizens and stakeholders to invest in the planning process, make sure that US Forest Service can likewise commit the attention that the process deserves.

    e. Be prepared, make people feel welcome and comfortable, and engage totally for the period of time you are working with the public. Give them your undivided attention.

10. Be patient, transparent, and adaptive.

    a. To build trust and ownership in the process, take one thing at a time, stay in constant communication, be timely and prompt in answering questions and providing documentation, and openly communicate with everyone as much as you can given your capacity.

    b. Communicate to the public that the US Forest Service will meet with stakeholders that request meetings.

    c. Don't be afraid to adjust the format of a public meeting based on how many people show-up. Be flexible and adaptive.

    d. Maintain transparency by sharing activities and progress continuously throughout the public participation process (e.g., via a short monthly online newsletter), instead of disappearing for months at a time.

Informing & Educating the Public

The case studies provide nine lessons related to informing and educating the public during the plan revision process.

1. Manage public expectations by taking time to inform and educate people about the planning process, timeframe and schedule, opportunities for public participation, and sideboards – including what is/is not part of the planning process.

2. Clarify the objectives and methods for public participation to minimize confusion and frustration.

    a. Some participants may expect the public meetings to be more akin to a public hearing and thus expect there to be opportunities to address the entire meeting -- rather than an open house format or working in small groups.

    b. Discourage "grandstanding" to keep meetings productive and maintain a collaborative spirit.

3. Provide a fact sheet about planning terms and definitions (e.g., "standard," "guideline," and so on), but don't get bogged down in terminology and semantics.

4. Move beyond jargon to share information; use everyday language that will resonate with most people.

5. Use maps and other visual images to share information about natural resources, issues, options, and other information; keep in mind that many people are visual learners and that a picture (or image) is worth a thousand words.

6. Provide information, reports, meeting summaries, and videos online so people everywhere can access, review, and learn from them.

7. Encourage informed participation by providing suggested readings/homework and engaging directly with stakeholders to learn of their specific concerns before public meetings and events.

8. Begin each public meeting or workshop by reviewing where you are in the planning process, how you arrived at this point, the role of public participation so far in the process, specific objectives for this particular meeting or workshop, and any substantive information that may be necessary to facilitate an informed dialogue.

9. Invest time and effort in mobilizing, engaging, and informing the public early on in the process; this should provide a solid foundation for future engagement.

a. The initial investment should catalyze interest and commitment to participate throughout the planning process.

b. However, beware that investing a lot of time in public participation during the assessment phase [while exhausting] is not a substitute to public participation throughout the rest of the planning process.

Seeking Input & Advice from the Public

Seven lessons from the case studies focus on ways to seek input and advice from the public.

1. One of the most useful meeting formats to solicit public input and advice is to:

    a. Present factual information first to ensure that everyone has a common understanding of the issue or topic in question;

    b. Allow participants to then work in small groups focused on specific tasks and deliverables to maximize interaction and participation;

    c. Ask each small group to then report-out to the full group;

    d. Ask the full group to then identify areas of agreement/convergence and disagreement/divergence; and

    e. Encourage participants to mingle and engage in more informal dialogue during a closing open house. This entire meeting format is best when it runs about four hours, though sometimes more time is helpful.

2. Allow and encourage participants to self-facilitate during small groups if there is an easy-to-follow format they can use and they are comfortable playing that role.

    a. Alternatively, ask US Forest Service officials to facilitate small groups if they and the small groups are comfortable with that approach; be sure to coach any and all facilitators about their role and responsibility to maintain an open, inclusive, and unbiased dialogue.

    b. Working in small groups encourages participation by people who would be unlikely to make comments to entire rooms. It helps participants feel more comfortable speaking up and sharing their opinions in such settings.

3. Maintain realistic expectations about participants staying within sideboards. Clearly defining issues for discussion and the reasoning behind why some issues are not on

the table helps to focus discussion, but some participants will inevitably want to comment on other issues and topics.

4. Use e-collaboration tools (e.g., collaborative mapping and/or a Wiki page) as a supplement, not a replacement for other methods to seek public input and advice.

    a. Be aware that the use of such tools for public participation is limited given the lack of interaction and give-and-take with other participants and experts.

    b. Online or e-collaboration methods also limit people's ability to understand other interests and viewpoints, as well as trade-offs among options.

5. Listen when people are talking and use their words when capturing their input and advice during public sessions.

6. Demonstrate to stakeholders and other participants how and why the US Forest Service used their input and advice.

    a. Given the divergent nature of interests and demands from groups with differing ideologies, carefully explain alternative scenarios, trade-offs, and consequences with each alternative.

    b. Be careful about characterizing any outcome as "consensus." Like collaboration, this terms means different things to different people.

7. Ensure that at least some "listening sessions" are open to everyone who is interested. Balance open sessions with "invitation only" listening sessions.

Using Professional Facilitators & Managing Effective Public Processes

The top ten lessons that emerge from the case studies relative to using professional facilitators and managing effective public processes are as follows:

1. Use professional facilitators to establish and maintain an open, transparent public process.

2. Use a professional facilitation team to design, facilitate, and manage public participation.

    a. The interdisciplinary team leader cannot manage public participation on top of all their other duties and responsibilities.

   b. Facilitators can support interdisciplinary teams by assisting with the logistics of the planning process.

3. Focus the planning process, and thus the facilitation team, on the strategic rather than operational level/detail; emphasize desired outcomes and avoid allowing the discussion to devolve into wordsmithing.

4. Realize that a recognized, credible outside facilitator can initiate and explain the planning, public participation, and NEPA process; update community members who are not consistently involved in the process; and build credibility and legitimacy to the planning process and the US Forest Service.

5. Don't over-estimate what a professional team can/cannot do, and approach it as an investment of time and money to meaningfully engage the public, stakeholders, tribes, and other governments.

6. The right facilitators can make all the difference.

   a. It is essential that the facilitators establish and maintain positive working relationships with all of the stakeholders and officials (including the US Forest Service), in addition to having good facilitation skills.

   b. The facilitation team should also suggest when and how to gather input and advice from the public, stakeholders, and other governments, and to otherwise design and manage the collaborative process.

   c. The facilitator can and should also help maintain an open, transparent process when it comes time to integrate public input and advice into the planning and decision-making process.

   d. The facilitator may also deflect some of the tension and mistrust directed at the US Forest Service, and maintain communication channels to interest groups that would otherwise not be as engaged in the process.

7. Take advantage of forest staff as facilitators/note-takers.

   a. Provide orientation and training as appropriate.

   b. Clarify their role as facilitators to the public – as facilitators, they are nonpartisan and impartial. Explain that they may also have other roles in the process, such a resource expert and/or decision-maker.

8. Using more than one facilitation team during the process can be inefficient and perhaps ineffective.

a. In some of the national forests included in this study, two different facilitating teams were used in this first phase of the planning process. Members of the team noted that this can be a tricky transition, as collaborative efforts and public engagement are centrally questions of managing people, relationships, and shared motivations.

b. Facilitators are professional process planners and thus prefer to be involved at every stage of the game.

9. When engaging with a facilitation team on public participation and collaboration, avoid the inward-focused decision-making that is common within the US Forest Service culture.

    a. Professional facilitation works best when the facilitators are part of the interdisciplinary team and decision-making process.

    b. The facilitation team should be involved in all aspects of the planning process, both internal and external.

10. Plan for newcomers at public meetings and workshops. Save time by reviewing at the beginning of each meeting where you are at in the process, how you got here, and the role of public participation to date. If newcomers have other questions, encourage them to meet with the facilitation team, US Forest Service officials, or other participants during breaks or after the meeting.

Consulting Tribes

The following lessons and prescriptions are designed to guide representatives from the US Forest Service and tribes as they engage in government-to-government consultation consistent with the 2012 planning rule:

1. The first step in the consultation process is critical. The Forest Supervisor should initiate government-to-government consultation as early as possible through formal consultation with tribal leadership. This initial consultation should:

    a. Clearly describe the purpose, schedule, rationale, and importance of the plan revision process and the phases involved;

    b. Ask tribal leadership (and tribal staff) what their preferred methods of communication are and options for proceeding with formal consultation (for example, Memorandum of Understanding, Partnership Agreements, and Cooperative Agency Status);

   c. Invite tribal experts in both cultural and natural resource issues to engage in the process; and

   d. Explain how tribal input will be taken into account.

2. Be flexible and allow the tribe time to deliberate.

   a. It may be necessary to allow tribal leaders or staff to think about the question and discuss it with tribal committees, members, or tribal councils.

   b. Make an explicit, intentional plan to follow-up and be sure to implement it.

3. Distinguish formal consultation procedures from informal types of communication. The Forest Service should be clear on whether it is notifying the tribe of an action or consulting with them and seeking agreement.

4. Forest Service officials should identify a single point of contact for each tribe during the planning process.

   a. Having one person engaged and able to communicate with Forest Service staff and tribal staff is critical to successful communication.

   b. The tribal contact or liaison should also ensure that tribal departments and tribal natural resource staff are updated and informed.

5. The demands of informally and formally consulting tribes through the entire revision process stress the need for designating a full time position to the task.

   a. Communicating on a face-to-face level to facilitate consultation through the entire revision process with multiple tribes is going to be a challenging undertaking for planners.

   b. This challenge highlights the need for Forest Service personnel to be well prepared, familiar with the consultation requirements and tribal expectations, and to plan ahead for designing effective ways of building relationships with tribes.

   c. Keep in mind that tribes do not often have the capacity to dedicate the necessary time or resources for either informal or formal consultation.

6. Explore opportunities to integrate tribal interests by including tribal representatives on interdisciplinary teams.

   a. On the Fremont-Winema National Forest, the forest included a Klamath Tribal Member on the interdisciplinary team.

b. In that case, a 2005 Memorandum of Agreement mandated that consultation not only be carried out with quarterly meetings between tribal program managers and forest supervisors but also include tribal involvement on the forest's interdisciplinary team.

c. This may be one of the most effective and meaningful ways for tribes to describe sacred sites, traditional ecological knowledge, and other sensitive cultural information; keep in mind that tribes are often reluctant to share such information because it may lead to potential degradation and/or abuse of such resources. The Forest Service should communicate that tribal input about sacred sites and cultural resources can be protected by law from becoming public information.

7. Explore the value of working with intertribal groups and organizations (e.g. Montana-Wyoming Tribal Leaders Council) to seek additional tribal input. However, contact or consultation with these types of groups is not a substitute for conducting government-to-government consultation with elected tribal leaders.

8. Clarify and emphasize that tribes have the ability not only to participate in planning through government-to-government consultation but also through the public comment process, collaboration, and other forms of agreement, such as cooperating agency status.

9. Ultimately, the Forest Service must not only consult with Tribes during planning revision to meet the planning rule regulations but also to meet its broad trust responsibilities.

10. Show tribes how their information was used. Incorporate the information from such consultations into planning documents and the decision making process.

Coordinating with Local Governments

Several lessons emerge from an independent study on how best to coordinate with local governments. The full memorandum on this topic is presented later in the report.

1. *Standardize planning processes among agencies* -- To local government officials, it often seems that all federal employees work for the "federal government." It is understandable then why local officials (and others) find themselves perplexed when one agency planning process differs vastly from another. While planning processes across various federal agencies will never be identical, even the most marginal standardization among agencies could significantly improve coordination. Start by using uniform language among the different agency processes.

2. *Build bridges between federal and local planning processes* -- While federal and local planners may use similar language to mean different things, federal planning processes share significant overlap with their local counterparts, including: use of inventories; goals and objectives; mandatory elements; fixed planning windows; public processes; and periodic review and updating. However, local governments often lack resources, expertise, and time to seek cooperating agency status. Thus, to increase efficiency, federal agencies should devise mechanisms to coordinate their planning schedules with local governments.

3. *Provide early, genuine involvement and include all stakeholders* -- In the words of one seasoned federal planner, "The goal [of planning] should be to involve as many people as possible who are willing to spend the time and share their expertise, and to work on a team toward a common goal. This is how the best planning is done and how teams make really strong, relevant long term comprehensive plans." Like other cooperative processes, the benefits of substantive and thoughtful engagement of local stakeholders flows both directions. Not only do strong federal-local relationships benefit local concerns, but also these bridges create opportunities for local citizens and groups to better understand the rigorous demands and difficult directives which typify federal planning across the board.

4. *Create planning areas that mirror resource areas* -- Arbitrarily designing federal planning areas without consideration of ecological boundaries often results in plans that do not meet aspirational goals. The result is local "frustrat[ion] about the fragmentation of planning". To counter this frustration, federal planners working on the Roan Plateau Resource Management Plan worked with multiple county stakeholders, each with differing interests, to design local resource management boundaries that mirrored county boundaries. Ultimately, this shift helped decision-makers prioritize which areas could be opened for oil and gas leasing and which areas should be protected as critical watershed areas.

5. *Have a succession plan for turnover during the planning process* -- There are both positive and negative effects of the enormous timespan over which federal planning procedures take place. One positive outcome is time for local participants to become acquainted with the complex setting. However, prolonged planning periods are not without their pitfalls. One of the most obvious is turnover. High turnover rates not only result in a loss of valuable institutional knowledge, but also lead to unconformity in application of critical planning principles. Thus, both local stakeholders and federal planners are well served by training "understudies", or designating multiple individuals with the same role.

6. *Maintain relationships over the long term* -- Long-term relationships between local and federal officials make the largest difference in planning outcomes. Under the 2012 Forest Planning Rule, local involvement should not be relegated merely to cooperating agency status. Rather, local involvement should be robust "early and throughout" the process. As a best practice, some federal offices are extending local officials broad participatory rights, even if they are not able to fulfill them, or attain

official cooperating agency status. Successful and meaningful coordination is often the result of individual staff members who take the time to develop relationships with local officials.