



Meridian Institute

Connecting People to Solve Problems

# Flathead National Forest Management Plan Revision

## Stakeholder Collaboration Final Report

*Prepared by the Meridian Institute*

*October 15, 2014*

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## Background

### Context

The Flathead Valley that includes the Flathead National Forest (the Forest) has experienced a shift in the local economy and conservation priorities similar to that faced by many towns and cities across the United States. An area formerly reliant on the timber industry to support the local economy is now faced with the challenges of balancing the sale of timber with the protection of critical habitat for endangered species, the recreation interests of many local residents and visitors, and preservation of unique wilderness areas. Over the last decade, the Forest has faced numerous appeals and litigation regarding management decisions, and relationships among the differing stakeholders is challenging. Major forest fires in the past decade have also inflamed discussions among interest groups and local citizens on how to manage the Forest effectively.

In the early 2000's the Forest invested considerable time and resources into the development of a new Flathead National Forest Management Plan (Forest Plan), which dictates how the Forest will be managed over the next 10-15 years. However, in 2006, the release of that Forest Plan was delayed as the Forest Service began to revise and update the National Planning Rule (Planning Rule), which guides all land management planning on national forests and grasslands. A major goal for development of a new Planning Rule was to move beyond persistent litigation that blocked prior efforts to update the Planning Rule. Today, the Forest is operating under a Forest Plan that was issued in 1986, and currently has 27 amendments.

In early 2012, the revised Planning Rule was released. The Forest was included in the second round of forests revising their forest plans under the new Planning Rule. As part of Forest Plan revision, the Forest decided to engage interested community members and groups early on in the process. The aim of early engagement was to encourage stakeholders to work together to compromise in certain aspects of forest management resulting in a revised Forest Plan with broad public support, and to prevent lengthy litigation stalls in the process.

In November 2012, staff from the U.S. Institute for Environmental Conflict Resolution (USIECR) visited the Forest and conducted an internal assessment of Forest employees to determine readiness and willingness to move forward with a collaborative process. A brief assessment was also done with a representative group of key stakeholders to determine willingness to engage in a collaborative process convened by a third party neutral. Both Forest employees and stakeholders indicated a third party neutral would be imperative to a successful collaborative process. Meridian Institute (Meridian) was selected to serve in that capacity. Meridian's role was:

- To conduct a situation assessment with key stakeholders;
- Based on the situation assessment, provide recommendations for stakeholder engagement strategies;

- Facilitate, manage, and document the collaborative public engagement process; and
- Design and facilitate an interagency work group.

## Goal

The goal in the Forest's collaborative process was to give stakeholders the opportunity to work together in an effort to provide recommendations to the Forest regarding the Forest Plan revision. A fundamental assumption was that the resulting recommendations, informed by a variety of views, would be different than what could be gained from simply asking stakeholders to submit individual comments.

Specifically, the collaboration meetings allowed interested stakeholders to:

- Share their opinions about the Forest Plan with one another;
- Learn from people whose interests and perspectives differ from theirs;
- Interact and discuss issues with Forest staff;
- Try to develop creative Forest Plan approaches to bridge differences and meet a range of user interests;
- Where possible, seek common ground
- Contribute recommendations for the development of a better, more successful Forest Plan;
- Gain a real stake in how the Forest is managed; and
- Develop the knowledge to stay constructively engaged through the rest of the Forest Plan revision process, as the Forest Plan is implemented and as it is updated in years to come.

The Merriam-Webster dictionary definition of collaboration is to: **“Work with another person or group in order to achieve or do something.”** Consensus was never the expectation.

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## Stakeholder Assessment

### Overview

The collaboration process was initiated with a stakeholder assessment. Between April 8–11, 2013 Connie Lewis and Utsarga Bhattarai of Meridian interviewed a diversity of stakeholders concerned about management of the Forest. The primary goals of the assessment were to learn about Forest management issues stakeholders were concerned about; identify challenges facing the Forest Plan revision; understand what the local collaborative groups that were already underway were accomplishing and how their efforts might compliment other engagement activities; and begin discussions about appropriate ways to include all interest groups in the Forest Plan revision process. A total of 23 people

were interviewed, 21 in person, and 2 by phone or via written correspondence. Following the interviews the Meridian team produced an un-attributed summary of the key issues, concerns, and suggestions for public engagement and collaboration in the Forest Plan revision process as expressed by the people who were interviewed.

Interviewees had a lot to say about the somewhat improved local climate for civil discourse and the potential benefits of a collaborative process to achieve more understanding and agreement on Forest management issues. They also identified a number of important questions and challenges, which are detailed below. Click [here](#) for the full assessment interview summary and list of interviewees.

## Assessment Findings

### *Collaboration – Value and Structure*

Many interviewees indicated general support for collaboration as a way to increase knowledge and build understanding among stakeholders and the agency; bridge differences; enable problem solving that leads to better plans and projects; engender respect and advocates; and potentially develop agreements – especially at the local, e.g., watershed, level. However there were very strong sentiments expressed about the critical importance of not allowing a collaborative process to front-load, trump, or overshadow the legally required National Environmental Policy Act (NEPA) process and the development of a range of alternatives.

No-one suggested that collaboration could guarantee the absence of litigation. However, some thought that a strong collaborative effort could help mitigate the chances that litigation would succeed. Others said that avoiding litigation should not even be a goal of collaboration, given its inevitability.

There were a range of opinions about what, if any, kind of collaboration design and structure would be most beneficial to achieve positive outcomes in the Forest planning process. When asked about the idea of convening a group of stakeholders with a limited, defined membership to represent interests across the Forest in collaborative deliberations, many interviewees expressed skepticism — for a variety of reasons:

- The Forest is large and diverse, and many of the issues people care about are geographically specific.
- It is hard to imagine a single collaborative group that could adequately represent every interest across the whole Forest, and still be small enough to function effectively.
- There is considerable “collaboration fatigue” already – so it would be hard as well as inefficient to keep a large enough group of people to represent all interests all actively engaged on all the issues.

- People tend to become more positional and to rely on affiliations rather than direct knowledge and experience when they are dealing with issues outside of their geographic locale.
- The likelihood of further frustration and distrust of the Forest's decision making process could be heightened if the collaboration process were diffuse and/or unproductive.

There were a variety of suggestions about alternatives to a representative collaborative– not necessarily mutually exclusive, including: setting up (or taking advantage of existing) mini-collaboratives in each ranger district (or some other geography that made sense); issue-specific working groups; some sort of coordination body that could help synthesize and/or reconcile input from different geographies and/or issue groups; a “process steering committee”; ad hoc community meetings; and on-line participation.

Those interviewees who spoke in favor of a representative collaborative, expressed a range of views about determining who should be included. Some thought it would be important to try to draw in people who have an active interest in the Forest's management even if they are skeptical about collaborating. Others thought that agreement to at least “try to collaborate in good faith” was an essential pre-requisite to membership. Several said that having constructive “bridge-builder” type personalities would be helpful. A number of interviewees also talked about the need for proxies for constituencies who are not local and/or who could not regularly attend meetings. Many suggested that it would be important that non-members be informed about and contribute ideas to the process.

A few interviewees also underscored the need for Tribal and inter-agency input and collaboration on the Forest Plan (e.g., involving other federal agencies and State and local governments) as well as approaching the Forest Plan from a landscape perspective beyond Forest boundaries.

It was also noted that the new 2012 Planning Rule characterizes collaboration as a recommendation, not a requirement. With that in mind it was suggested by one interviewee that the Forest might be better served by preparing a “proposed action” without up-front collaborative input (perhaps utilizing the 2006 Proposed Draft Forest Plan as a basis, since it was developed with a lot of public comment). Or, at least have the Forest conduct an open discussion with stakeholders about the perceived advantages of collaboration and how to frame a collaborative effort.

### *Transparency, Inclusiveness, and Accessibility*

Interviewees generally concurred that any collaboration process(s) must be transparent, inclusive, and accessible in some way to all interested stakeholders. For example, meetings would need to be open and minutes distributed/posted in a timely fashion, and able to be amended if there were mistakes or omissions. There should be a wide variety of ways for people to learn about the process(s) and to be able to contribute comments and suggestions

(e.g., blogs, websites, social media engagement, local media outlets, community meetings around the Forest, personalized outreach for “hard-to-reach” demographics that might not normally participate, mechanisms to ensure representation by regional and national interests, etc.).

### ***Process Ground-Rules, Timeline, and Facilitation***

Several interviewees who referenced having had a positive experience with the Whitefish Collaborative said that their success was attributable in part to having established agreed-upon operational ground-rules at the outset; a pre-determined timeline (i.e., end in sight); and, a strong, respected, unbiased facilitator. All of those features were recommended for any new collaboration process(s).

### ***Relationship to Existing Collaboratives***

Many stakeholders suggested using existing collaborative groups (e.g., Whitefish Collaborative, Island Range Collaborative, Swan Lake Collaborative) as building blocks and/or models for additional or more broad-based collaboration because in some cases they have already established trusting, working relationships among diverse stakeholders. Some said that the Flathead National Forest Resource Advisory Committee (RAC) could be a useful starting point for a Forest-wide collaborative effort. Others thought the RAC’s focus and membership was too narrow for that purpose.

### ***Forest Service Role***

Most interviewees concurred that Forest Service participation in collaborative process would be both positive and necessary. Various interviewees suggested that the Forest’s role should include:

- Assuming leadership at the outset by articulating a vision for the Forest;
- Defining boundaries and sideboards for the discussion by clearly identifying “immoveable” issues that cannot be addressed at the Forest level because of existing State and federal laws and regulations;
- Explaining financial and other constraints and realities (without dampening creative thinking); and/or
- Serving as a technical resource.

### ***Substantive Focus***

Several interviewees said that it could add efficiency to review the 2006 Proposed Draft Forest Plan, which was never finalized, for relevant elements that could form a partial basis for the new planning effort. However some interviewees preferred starting from scratch, noting significant flaws in the 2006 Proposed Draft Forest Plan.

The question of how to distinguish Forest-wide issues (i.e. that are relevant for the Forest Plan) from localized, project level issues is one that many interviewees struggled with. Some of the cross-cutting issues heard during the interviews were: noxious weeds and invasive species; fisheries and water quality; access to, and timing of, land and water based recreation; road closures; and grizzly bear and lynx habitat.

### *Additional Challenges and Concerns*

Interviewees articulated a number of additional challenges and concerns that needed to be considered and addressed:

- Having a few vocal participants overshadow other voices;
  - Maintaining participation and momentum during the summer months when many interested stakeholders are especially busy; and
  - Determining the relationship to the Grizzly Conservation Strategy.
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## Process Design

### Elements of the Proposed Process

Taking into account the input from the stakeholder assessment interviews, the Meridian Institute team prepared a draft process design outline, for discussion at an initial process design workshop with interested stakeholders. The final process design outline is [here](#). The elements of the suggested process included the following elements:

#### 1. Initial Process Orientation Meeting:

- “Forest Planning 101”, to provide an overview of the elements of forest planning, the anticipated Forest Plan revision schedule, the role of stakeholders, etc.
- An orientation to the suggested collaboration and stakeholder engagement process, expected time commitment to join a work group, etc.
- Presentation / discussion about increasing chances of success in a collaborative process.
- Defining and “signing up” for work groups that focus on particular resources / plan elements, etc. - tentatively mirroring the topics discussed at field trips that had been conducted in late summer/early fall 2013 about particular management topics.
- Initial organizational session for each work group to discuss the schedule going forward, information needs from the Forest, etc.

2. Topical Work Groups (meeting on an as-needed basis to be defined by each work group, i.e., bi-weekly to monthly) to work through issues, and develop tentative recommendations about Need for Change and Forest Plan Direction to take to the next plenary meeting:
  - Each work group would be open to anyone, but with an expected core set of participants;
  - Likely to meet at least partly by phone given geographic dispersion; and
  - Each group would have an assigned Meridian facilitator to provide facilitation and other support.
3. Plenary meetings conducted periodically to bring together all the work groups:
  - The tentative expectation was to conduct two plenaries after the initial orientation meeting – tentatively in January and March 2014;
  - Open to anyone (including anyone interested in attending even if they were not on a work group);
  - Work group products shared and feedback provided;
  - Level of support / agreement / disagreement assessed;
  - Additional “charges” given by plenary to each work group; and
  - New work groups formed as necessary (and ones that are finished disbanded).
4. Interagency group comprised of government agencies interested in the Forest Plan revision:
  - Convene early in the process to provide initial input on key issues, questions, concerns, suggestions; mid-way for a check-in on progress; and at the end to hear summary of progress, review next steps in the planning process etc.;
  - Could hold meetings in conjunction with other meetings; and
  - Also leave open the option of including any interested agency representatives in plenary and sub-group or work group meetings.
5. Additional Outreach and E-Collaboration:
  - Extensive outreach and variety of mechanisms to support participation by regional and national interests as well as by typically under-represented populations, and people who may not choose to attend meetings, but wanted their voices heard.

## Process Design Workshop

The draft process design was circulated by email to interviewees and others who had expressed interest but were unavailable for an interview for their feedback, and then presented and discussed at a Process Design Workshop (Workshop), held September 25, 2013. The Workshop provided an opportunity for interested stakeholders to review the process design, hear a summary of the feedback that was received, and to discuss how to incorporate feedback, address concerns, and move toward a final process plan that would

meet stakeholder and Forest interests and needs. The Workshop attendees provided a number of helpful suggestions for the process elements.

Following are key suggestions from the Workshop that were incorporated in the process:

- Teleconferencing should be available to the extent possible for people to join future meetings remotely.
- When possible, meetings should be scheduled during weekday evenings to accommodate stakeholder work schedules.
- There needs to be clarity about the policy and legal sideboards that will bound the work group deliberations.
- Work groups should focus on developing recommendations at the Forest-wide “30,000 foot” level (recognizing that Forest-wide recommendations are still based on the varying conditions that exist across the diverse Forest landscape).
- Maps should be integral to the deliberations.
- The collaborative process should address a core set of significant issues, but there should be ample opportunity through the NEPA process for public comment on the full suite of issues covered by the Forest Plan.

The Workshop summary and list of attendees is available [here](#). Following the process workshop, the Meridian team and the Forest staff worked together to incorporate suggestions from the Workshop into the collaborative process design and to prepare for the collaboration meetings and calls that were to be conducted over the following eight months.

### Process Advice Calls

Given their commitment to continually work to address stakeholder process concerns, learn from mistakes, and improve at every juncture, Meridian offered all stakeholders an open-ended opportunity to call or email the Meridian facilitation team at any time about any concerns and/or to offer suggestions regarding the process. In addition, Meridian conducted two “process advice calls”, the first on January 30, 2014 and the second on April 15, 2014, to gather feedback and recommendations regarding the collaborative process. The calls were open to any interested stakeholders. The initial concept had been to conduct these calls with a designated group of stakeholders who were representative of the range of interests concerned about the plan, who had a particular interest in collaborative process (in addition to the substantive issues being discussed), and who could play a helpful role as bridge-builders in the community. However, when concerns were raised about transparency and inclusion, the decision was made to open the calls to any interested stakeholders. Click [here](#) for the January 30 and April 15, 2014 process advice call summaries and list of participants.

## Nature of the Collaborative Group

The original proposal, prepared by Meridian Institute in conjunction with USIECR contemplated a defined group of stakeholders, representative of the diverse interests concerned about the Forest, working together to develop recommendations for the Forest Plan, with occasional outreach to the broader community of stakeholders.

However, the stakeholder assessment – and subsequent interactions with stakeholders - revealed deep skepticism about the notion of a single Forest-wide multi-stakeholder collaborative group being able to represent or gain the trust of such a large, diverse, polarized set of interests. The Forest staff concurred with Meridian that a process that fully engaged the larger community (rather than focusing on a small group of representative stakeholders) would better serve the intent to gather input from the full range of perspectives as long as it was conducted in a way that encouraged collaboration among diverse interests. This decision had numerous consequences for how meetings were conducted, discussed below.

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## Collaboration Meetings

### Orientation Meeting

The first activity in the collaboration was an orientation meeting, originally planned for October 10, 2014, and then rescheduled due to the federal government shut-down to December 5, 2013. The purpose of the orientation meeting was to provide stakeholders with information about stakeholder involvement in the initial phase of the Forest Plan revision. Specifically, the meeting:

- Provided an overview of the Forest Plan revision context and schedule, and an introduction to Forest Plan components;
- Explained policy “sideboards” for the Forest Plan revision;
- Allowed an opportunity for stakeholders to ask questions and request more reference materials;
- Provided an overview of expectations and operating ground rules for the collaboration process; and
- Introduced and launched topical work groups (one addressing habitat, vegetation and disturbance, and another focused on recreation, access, and recommended wilderness) including an overview of the work plan, scheduling, and suggested homework.

Over 100 stakeholders attended the orientation meeting, and there was an option for stakeholders to join the meeting remotely via teleconference. A summary of the meeting, informational handouts and PowerPoints, are posted on the [Orientation Meeting page](#) of the website.

## Stakeholder Collaboration Meetings

The stakeholder collaboration meetings focused on key components that comprise the Forest Plan - desired conditions, objectives, and management areas - starting at a forest-wide scale and then moving to the “geographic area” scale, in the following sequence:

- January 22, 2014 – Three concurrent topical workgroups specific to wilderness, vegetation, and access/recreation (forest-wide desired conditions)
- February 19, 2014 – Vegetation (forest-wide desired conditions continued)
- February 20, 2014 - Wilderness/recreation workgroup (forest-wide desired conditions continued)
- March 19, 2014 – Vegetation (Forest-wide objectives)
- March 20, 2014 – Wilderness/recreation workgroup (Forest-wide objectives)
- April 21, 2014 – Salish (Geographic Area (GA) specific desired conditions)
- April 22, 2014 – Swan (GA specific desired conditions)
- April 23, 2014 – Hungry Horse, South Fork, and Middle Fork (GA specific desired conditions)
- April 24, 2014 – North Fork (GA specific desired conditions)
- May 12, 2014 – South Fork and Middle Fork Management Area (MA) meeting
- May 13, 2014 – Swan Valley and Salish MA meeting
- May 14, 2014 – Hungry Horse and North Fork MA meeting
- May 15, 2014 – Forest-wide MA meeting

In total approximately 100 individuals attended some or all of the stakeholder collaboration meetings. This estimate is based on those who signed in. Meeting agendas, summaries and background materials are all posted on the [Past Meeting page](#) of the website.

The stakeholder process design evolved over time, in response to what was learned during the stakeholder assessment, contract and budget issues, delays resulting from the federal government shut-down, and experience gained during meetings. All changes made were in consultation with the Forest.

The collaboration meeting in January 2014 was organized around topics that aligned with the Forest Plan issues for which the Forest planning staff were seeking input (habitat, vegetation, and disturbance; recreation, access; and, recommended wilderness). The Forest prepared background materials associated with each topic and Meridian worked with the Forest on a detailed set of questions to help structure the discussions, with the expectation that 15-20 people would participate in each of the three discussion groups. However, the meeting attendance was much higher than had pre-registered, resulting in as many as 50 people in a single group. Also, many of the attendees had not attended the December orientation meeting and were therefore unfamiliar with forest planning and the issues being discussed. This was exacerbated by a few dominant voices that in a large group made

participation difficult for others. Consequently, it was not possible to get through the questions and the result was frustration for all. Following the meeting Meridian worked closely with the Forest staff on a different format, structured around small table discussions (with 6-8 people per table) to better accommodate the high stakeholder interest. In subsequent meetings the small table format proved to be much more effective for involving everyone, enabling more in-depth discussions, and engendering more collegiality, although it moved the focus away from having distinct work groups.

### Interagency Group

The reason for convening an Interagency Group as part of the Forest Plan revision collaboration was to ensure that the revised Forest Plan reflects the shared objectives and values of other land management and regulatory agencies in addition to those of the Forest. The objectives for the initial phase of engaging with other agencies were to:

- Obtain agency feedback on the elements of a modified version of the 2006 Proposed Draft Forest Plan that may be included in the new Forest Plan revision;
- Identify other agency plans, processes and activities that should be considered by the Forest during its Forest Plan revision process; and
- Build an ongoing relationship and forum that can continue throughout the Forest Plan revision process.

The first meeting of the Interagency Group took place on December 6, 2013. It was attended by 12 individuals from the following agencies and jurisdictions:

- Bureau of Reclamation
- Flathead County Planning Department
- Flathead County Commissioners
- Glacier National Park
- Missoula County Community and Planning Services
- Montana Department of Natural Resource, Northwest Field Office
- Montana Fish, Wildlife and Parks, Region 1
- US Fish and Wildlife Service
- US Border Patrol

Several other agencies were invited but unable to attend. The purposes of this meeting were to provide:

- An overview of the Forest Plan revision process;
- An opportunity for participants to raise questions, concerns, and suggestions for the revision process; and
- An opportunity for participants to contribute initial input on key issues in the Forest Plan revision topics.

One of the key outcomes of the meeting was a list of resources suggested by attendees for the Forest to consider as part of its Forest Plan revision process. The December 2013 meeting summary, including the list of suggested resources and list of attendees can be found [here](#).

The second Interagency Group meeting was conducted July 15, 2014. It was attended by 5 individuals from the following agencies and jurisdictions:

- Confederated Salish-Kootenai Tribes
- Flathead County Commissioners
- Missoula County Community and Planning Services
- Montana Fish, Wildlife and Parks, Region 1
- US Border Patrol

The purposes of the meeting were to:

- Provide updates on the Forest Plan revision process and an overview of the results of the stakeholder engagement process;
- Give Interagency Group members an opportunity to raise questions, concerns, and suggestions for the next phase in the plan revision process;
- Provide information on relevant policies, planning initiatives, or other activities that have been initiated or implemented by other jurisdictions since the previous Interagency Group meeting; and
- Identify any additional resource materials that should be exchanged.

The July 2014 meeting summary and list of attendees can be found [here](#).

### **Forest Service Planning Rule Federal Advisory Committee Meeting**

After the last stakeholder meeting in the Forest collaboration process several members of the stakeholder community – representing a diversity of perspectives – were invited by the Forest to share their perspectives about the process with the National Forest Planning Rule Federal Advisory Committee, which happened to be meeting in Missoula, MT. This provided a valuable opportunity for those stakeholders to reflect on their experience, compare notes with stakeholders from other national forests in the region, and provide recommendations for what forests around the country might learn from the collaboration experience.

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### **E-Collaboration**

The stakeholder collaboration process included electronic and web-based platforms (E-collaboration) to serve the following purposes:

- Provide information to stakeholders about the collaboration activities and the results of discussions that took place;

- Gather and share feedback, questions, concerns, and recommendations from stakeholders about the deliberations taking place in each activity;
- Enable meaningful engagement at and between meetings by stakeholders who attended meetings and/or participated in calls and those who could not; and
- Ensure an open, transparent process throughout each stage of Forest Plan revision.

Meridian reviewed several potential tools to determine which ones would best serve the needs of the process. The Options for E-Collaboration document (Appendix A) describes all the tools that were considered. Tools were evaluated and eventually selected in consultation with the Forest staff based on the following criteria:

- Ability to provide accessibility to stakeholders around the country;
- Available through a variety of mechanisms;
- User-friendly interface(s); and
- The financial and human resources (Meridian's and Forest's) that would be required to set-up and manage the tool.

## Websites

### *Meridian-Managed Website*

Meridian designed and managed a publicly accessible website that included announcements, meeting times and locations, meeting agendas and summaries, informational background documents about the Forest and the Forest Plan revision, and resources requested by the stakeholders (e.g. maps, Amendment 21, scientific reports, etc.). This site was accessible to the public, contained links to other informational sites and communication mechanisms (e.g. Facebook, Flathead National Forest website, Google Group, etc.), and served as a central location for information on the Forest Plan revision.

### *Flathead National Forest's Existing Website*

The Forest's existing website, which is publically accessible and easily searchable using online search engines, was used to also provide basic information regarding upcoming meeting dates and times, background information, announcements, etc. The Forest website also provided links to other informational sites and comment mechanisms (e.g. Google Group, Talking Points Collaborative Mapping Tool, etc.).

## Social Media

Meridian hosted and helped maintain a "Discover the Flathead" Facebook page that was mainly administered by the Forest. The Facebook page was used as a social networking site to increase awareness of the Forest Plan revision process. Meridian posted meeting announcements to the Facebook page, as well as links to the Flathead National Forest Plan

Revision Google Group (described on pg. 16), encouraging stakeholders to engage in dialogue in the forum.

## **Electronic Mailing Lists**

Meridian and the Forest staff used an electronic mailing listserv to announce meetings, request information, and provide links to draft meeting summaries, additional resources, and discussion forums. Stakeholders interested in being added to the listserv could send a request to Meridian via e-mail, as explained in instructions provided on the Meridian-managed website. The listserv was created and maintained by Meridian.

## **Comment Mechanisms**

### *Blog*

Initially it was decided to use a discussion forum in the form of a blog page on the Meridian-managed website as the E-collaboration comment mechanism. The discussion forum offered comment and reply options such that posts could be structured as conversation “threads,” with the ability to reply to a particular post or response. However, technical difficulties were experienced with the blog page, including frequent periods in which the content and existing posts on the page could not be viewed and new posts could not be made. After being unable to resolve this issue with the website content manager, Meridian and Forest staff chose to stop use of the discussion forum and transition to using a Google Group.

### *Google Group*

The Google Group, called the Flathead National Forest Plan Revision E-Collaboration Google Group, was organized to collect stakeholder feedback around the key Forest Plan components (i.e. distinctive roles and contributions, forest wide desired conditions, forest wide objectives, forest wide standards and guidelines, geographic area desired conditions, and management areas). The Google Group also included a general public forum, which was a space to discuss other topics that are not specific to the plan components. All previously posted comments and replies were transferred to the Google Group, where further posts were able to be added to the existing conversation threads. More specifics about how the Google Group was structured and utilized are available in Appendix B.

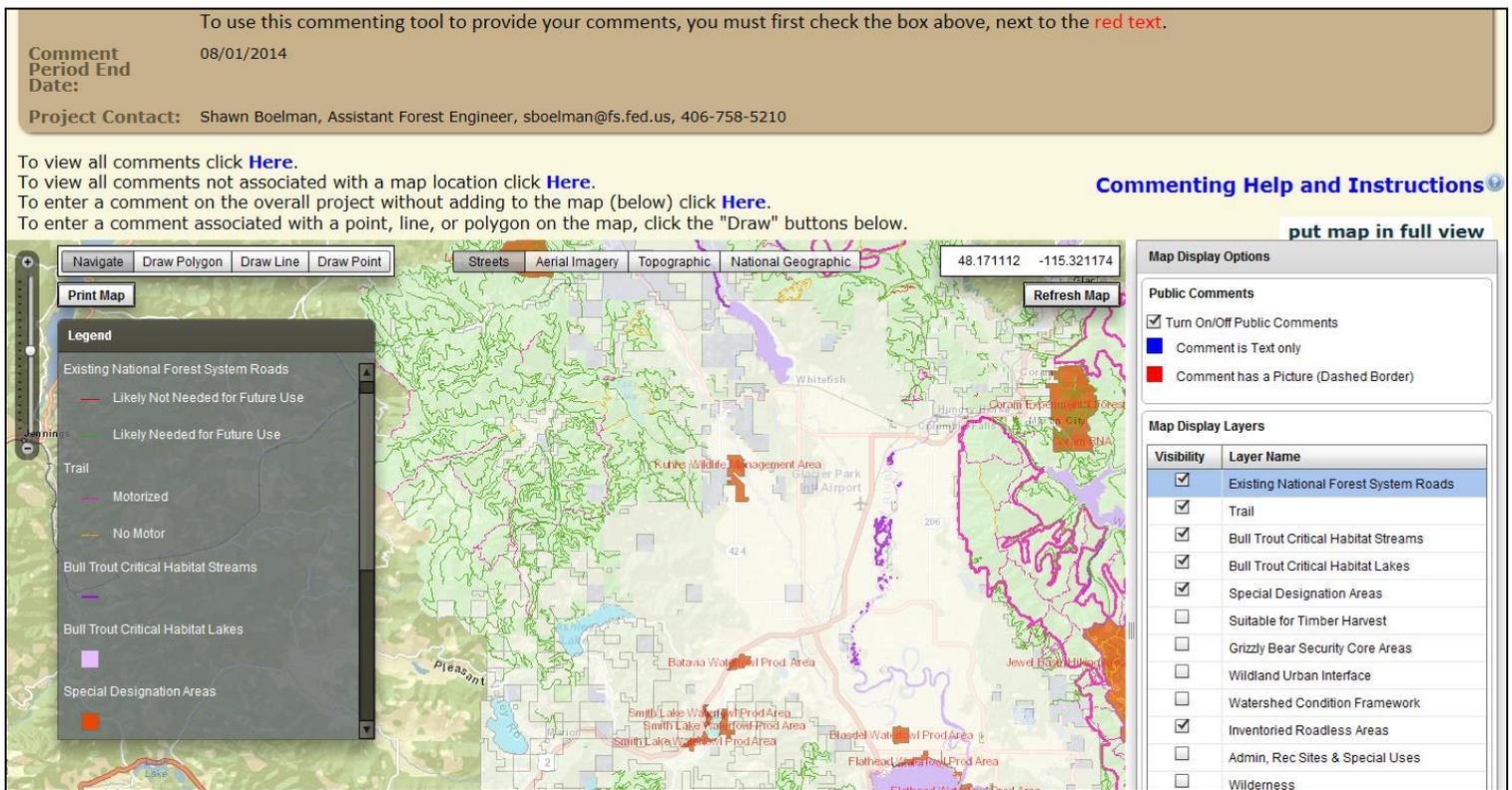
## Email

Several stakeholders also used e-mail to provide comments on the Forest Plan revision and collaboration process. While Meridian and Forest staff were happy to receive input from stakeholders by whatever method stakeholders preferred, sending comments via e-mail inhibited multi-way dialogue with other stakeholders.

## Talking Points Collaborative Mapping Tool

A web-based interactive mapping tool, called the Talking Points Collaborative Mapping Tool (TPCMT), was developed and managed by Forest. The purpose of the TPCMT was to broaden stakeholders' ability to communicate and link their comments to specific areas of the Forest, and to engage in collaborative learning with other members of the public and Forest staff. Stakeholders were able to identify and draw a point, line, or polygon on the Forest map and could leave a comment related to that area of the Forest for all public and Forest Service users to see and reply to. Pop-up user guides were provided throughout the website to assist stakeholders in utilizing the website to its fullest capabilities. Comments posted to the TPCMT were reviewed by Forest staff on a regular basis. A screenshot of the TPCMT page is shown in Figure 1.

Figure 1. Screenshot of the Talking Points Collaborative Mapping Tool.



## Online Assessment

An online assessment was conducted prior to the initial stakeholder collaboration meeting held on January 22, 2014 to discuss forest-wide desired conditions. The purposes of the assessment were to: 1) assist the Meridian and the Forest staff in the development of the agenda and framing of the discussion for the meeting; 2) stimulate thinking among attendees prior to the meeting, and 3) help the facilitation team prepare for and facilitate productive discussions. The assessments contained the draft forest-wide desired conditions from the Modified 2006 Proposed Draft Forest Plan for the topics of:

- Designated Wilderness;
- Recommended Wilderness;
- Developed and Dispersed Recreation;
- Fire/Fuel Management and Air Quality;
- Forest Products;
- Soils, Watersheds and Aquatic Ecosystems;
- Vegetative Composition, Size Class and Structure;
- Wildlife and Plant Species Diversity; and
- Access and Travel Management.

For each of the topics, the assessment participants were given the opportunity to rate the desired conditions based on whether or not they would recommend it to be included in a proposed Forest Plan, and what, if any, changes should be made to the language. Participants also had the option of including additional forest-wide desired conditions to be considered.

A total of 28 stakeholders participated in the assessment, with 12 of these stakeholders providing written comments. The results from the written comment portion, organized based on the topical areas, are posted [here](#). The team subsequently decided against using any more assessments, in part due to the small response rate, but also because of concerns that were raised about potentially violating the Paperwork Reduction Act.

## Virtual Participation

Originally, there was consideration of offering the option of conducting some work group meetings entirely via conference call. However, due to the high number of participants, the team decided against that option. A conference line was offered as an alternate mode of participation for in-person meetings. On average, approximately two to three individuals utilized this option when it was available. Unfortunately, the conference lines provided a far from satisfactory experience for those who tried to use them because it was usually difficult to hear what was being said or to find an opportunity to participate. Another draw-back to phone participation, which was specific to rural Montana, was that the local phone service did not offer toll-free calling. Therefore, even though the conference line was a toll-free

number, any individual calling from a personal phone-line would incur a large expense. To remedy that issue, Meridian offered the option of dialing out to participants.

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## Outcomes and Recommendations for Future Stakeholder Engagement / Collaboration Processes

### Results

The Forest collaboration meetings resulted in detailed input about the Forest Plan revision. The difference between the input received during the collaboration process, and what would have been contributed through a more traditional comment process was that the stakeholders who participated had the benefit of being able to hear, debate, and build upon other stakeholders' ideas.

The collaborative meetings resulted in several innovative recommendations with some agreement across discussion groups. Examples included: 1) potentially including a "front-country" management area designation to accommodate concentrated recreational uses; 2) exploring some places where possible recommended wilderness designations might be acceptable if other areas are open to certain motorized use, 3) providing a higher level of protection to a rare riparian habit in the Swan Valley; and 4) re-evaluating the Residential Urban Intermix designation in the 2006 plan. Many other recommendations emerged from individual tables, and are captured in detail in the meeting summaries.

This process gave participants with different viewpoints on issues, such as motorized and non-motorized advocates, the opportunity to explain the rationale and interests behind their positions and to prioritize their recommendations. This dialog gave the Forest planning staff important insights and information upon which to base their decisions about what to include in a proposed action and in a range of alternatives.

From the perspective of Meridian Institute, the Forest stakeholder collaboration was both rewarding and challenging. It was rewarding because, according to the Forest Supervisor and planning staff, the input and recommendations from the collaborative discussions:

- Contributed to stakeholders having a more in-depth understanding of the resource issues and trade-offs associated with national forest system land use planning and consequently more informed comments about the Forest Plan revision;
- Gave the Forest valuable, quality information to consider in developing a proposed plan;
- Resulted in a more engaged and educated Forest constituency; and
- Will lead ultimately to a significantly better Forest Plan.

The Forest's feedback, which was relayed to the Meridian facilitation team in numerous individual conversations and during the debriefings conducted after each meeting, is

documented in the April 15, 2014 process advisory call summary, in the final May 15, 2014 Forest-wide management areas meetings summary, and elsewhere.

## Stakeholder Feedback

Feedback from stakeholders was mixed. As noted above, the first stakeholder meeting was frustrating for a number of reasons. However, once the format was adjusted, the tenor of the process changed – the discussions at the small tables were extremely lively and for the most part civil. Attendees were observed delving deeply into the background material, asking for clarification and more detailed information from Forest Service staff, pouring over maps, and engaging with one another to try to understand one-another’s perspectives and develop recommendations that could satisfy multiple interests.

Many people who attended meetings expressed appreciation to the facilitators and to the Forest staff for the opportunity to engage so deeply on issues of such great importance to the community. A lot of attendees also commented on the immense value of having access to Forest staff expertise. There were several people who noted how much it meant to have the Supervisor and the Interdisciplinary Team members present - listening to stakeholder input, and striving to understand the concerns and suggestions being presented. The Forest received a memorable email from a stakeholder who had been extremely critical of the process from afar. After she actually attended the April 22 meeting she wrote:

*“Hey Joe, Last night’s meeting is the buzz. GREAT JOB!!!! We were all impressed and felt it went very well.”*

Another critical stakeholder who steadfastly said he would still prefer a tight, representational, invitation-only process along the lines of the Whitefish collaborative nevertheless told the Forest Interdisciplinary Team leader and the Meridian staff that he was very impressed with how the meetings were conducted and enjoyed the discussions a great deal – his words after he actually came to two of the stakeholder meetings.

The challenges faced by the Meridian Institute facilitation team and the Flathead National Forest derived from the reality that a few stakeholders were (and still are) deeply skeptical of the Forest’s and Meridian’s intentions, and fundamentally opposed to this kind of collaborative process as a way to engage the public on Forest Plan issues. Some of the overt opposition was rooted in the fact that it was designed as an “open collaborative” in which anyone who attended at any time was part of the deliberations, as compared to an appointed deliberative body comprised of a designated set of stakeholder representatives who met consistently over time and would occasionally accept public comment. This resulted in fluid, inconsistent participation, and involvement by all kinds of people – with variable degrees of knowledge about Forest Plan issues and/or legal sideboards, and all kinds of engagement preferences and styles (some wanted small groups focusing on discrete issues or geographies; others wanted Forest-wide discussions that kept everyone focused on

the comprehensive big picture). The following stakeholder comments illustrate some of the discontent:

*“I remember the interview we did at the hotel in Kalispell in the assessment phase of this effort. I expressed real reservation with the idea that Meridian or anyone could design an effective collaborative process that covered the whole FNF; the scale is too large and the constituencies removed from their geographic centers. I also suggested that it would be much more effective to attempt collaborative processes at the level of individual GA’s. I think the forest-wide effort was ineffective or at least produced very small return for the public dollars invested and for the public time and commitment expended. I think the GA meetings have the potential to produce much more useful information. My take away from last night affirms that. But it’s still not ‘collaboration’; they’re round table discussions that lay the issues on the table with the obvious common ground that people really love these landscapes – for various reasons. And obvious differences between motorized and wildlife advocates.”*

*“I guess I have one overriding question/concern: many of the responses to the Feb. 19 and 20 questions don’t appear to be constrained by the reality of the laws or regulations that the FS must comply with. That’s to be expected with the general public. There’s value in people expressing their views and desires, but the process seems unburdened by realistic sideboards.”*

*“The process has entertained wildly unrealistic proposals that ignore the current situation and the legal and scientific sideboards within which the Forest must be managed. This is causing a widening gap between folks who have set a portion of their self-interest aside to advocate for fish and wildlife and those advocating for their self-interest and personal uses of the Forest.”*

Based on their experience with this phase of the collaboration process, the Meridian Institute facilitation team identified a number of lessons and suggestions for future stakeholder engagement / collaboration. Some of the recommendations are drawn from what worked really well. Others are derived from aspects of the process that were challenging and/or that did not go as well as hoped.

### **Recommendations Based on What Worked Well**

**Make sure to have a clearly defined “road-map”.** The Forest developed a “road-map” for the process that explicitly aligned the stakeholder collaboration activities with the Forest Plan components (for example see diagram below).



The stakeholder engagement meetings were organized in order around the Forest Plan components, sequenced from a broad Forest-wide perspective to geographic areas within the Forest, and eventually to management areas. This structure was helpful in that each meeting built on the foundation established at prior meetings.

6. **Selectively focus on key planning issues** rather than the entirety of what is encompassed by a Forest plan. The Forest chose to focus on selected issues (vegetation management, recreation and access, and wilderness) that have historically been the most controversial, and for which there is real “decision-space”. Given how hard it was to get through even a limited number of topics in the available time, it would have been impossible to tackle everything in the Forest Plan.
7. **Define the sideboards** (e.g., laws and regulations and other factors that guide/constrain the Forest’s management flexibility). Sideboards were helpful to narrow discussion to what was within the purview of a Forest Plan and within the Forest’s legal authority. While it was clear that not all stakeholders heard, understood and/or stayed within the sideboards during the discussion, the sideboards nevertheless helped define the scope of the deliberations.
8. **Provide extensive, updated and synthesized background information and maps.** The Forest provided a modified version of the 2006 Proposed Draft Forest Plan as a resource and potential jumping off point for the discussions – rather than simply asking stakeholders to start with a blank slate. This allowed participants to make much more progress than if they had started “from scratch”.

As noted above, the Forest staff also prepared background packets that contained key information from the Forest Plan Assessment about each of the topical issues under discussion, and several map layers to inform the management area discussions. What the facilitation team observed in the meetings was that the background documents – which were shorter and more synthesized than the eventual Forest Plan Assessment – were extremely helpful, as were the maps. In addition to providing critical information, the documents and maps actually became a framework for discussion.

9. **Encourage consistent engagement by highly knowledgeable Forest staff** who understand and support the collaborative process. The fact that the Forest leadership, most of the Interdisciplinary Team members and many other specialists were regularly at the stakeholder meetings made a tremendous difference in the process. Many stakeholders commented on the learning that occurred as a result of being able to take advantage of the Forest staff's expertise, and expressed deep appreciation for their time and commitment.
10. **Take advantage of Forest staff willingness to serve as facilitators/note-takers.** Once the decision was made to organize stakeholder meetings around small "table-top" discussions it became essential to expand the pool of facilitators and note-takers beyond what could be provided by Meridian. The Forest staff handled those roles extremely well – not easy given their responsibility for the Forest Plan, and the highly polarized, often fractious nature of the debates. That they did so willingly and with great professionalism and grace, made it possible to conduct multiple facilitated discussion groups simultaneously, and capture key messages and recommendations that would otherwise have been lost.
11. **Foster teamwork and be willing to adapt.** The Meridian- Forest team worked well together. They held a weekly conference call to coordinate their activities and share updates. When problems arose they addressed them quickly and honestly. From Meridian's perspective, this quality working relationship was key to achieving positive results.
12. **Utilize pot-lucks.** Since the meetings took place over the dinner hour, and government agencies are prohibited from using government funds for food at public meetings, Meridian and Forest staff provided pizza at a couple of early meetings and then light snacks. When Meridian tried scheduling a sufficiently long break for people to leave for dinner it resulted in too much time being lost. Eventually, at the last meeting, the team suggested a pot-luck. The response was very favorable. The chance for stakeholders as well as the Forest staff to talk informally over a shared meal (which included wonderful home-cooked dishes) created a sense of collegiality and community. Future stakeholder engagement processes might do well to integrate similar opportunities into their meetings when possible.

### Recommendations Based on Aspects of the Process that were Challenging

13. **Establish realistic expectations about not all stakeholders staying within the sideboards.** One of the features of an "open collaborative" is that any and all stakeholders are genuinely welcome and can move in and out of the process at any time. Most of the stakeholders who attended the collaboration meetings did so with an understanding of the sideboards. However, some either truly did not understand those boundaries, or wanted to talk about issues outside of the scope of the Forest Plan revision, in spite of the stated sideboards. As a result, other stakeholders were often

frustrated - some asked facilitators to confront/filter/disallow what they deemed to be irrelevant and/or inaccurate comments. The facilitation team's explanation that it was inappropriate for facilitators to assume that role did not ameliorate the frustration. The lesson for the future is to make it clearer from the outset that all comments will be accepted, even as stakeholders are encouraged to stay within the sideboards.

14. **Publish the Forest Plan Assessment prior to stakeholder discussions.** The stakeholder collaboration process was complicated by the fact that the Forest Plan Assessment was not published in time for the beginning of the collaborative process. Since the Forest Plan Assessment was not yet available, the Forest staff produced background documents that contained critical information drawn from the Forest Plan Assessment – even though the Assessment itself could not be distributed. A few stakeholders were nevertheless frustrated at not having the full Forest Plan Assessment document until late in the process, and they advocated discontinuing the collaboration meetings until it was released. The Forest's decision to remain on schedule and go ahead with the meetings in spite of those requests remained a point of contention with some stakeholders. The take-away lesson for other forests undergoing plan revisions under the 2012 Planning Rule is to provide the Forest Plan Assessment prior to stakeholder meetings, if possible, to aid discussions.
15. **Be clear at the outset about the level of consensus/concurrence that can be expected from this kind of stakeholder process.** The Forest and Meridian together established a high bar for the process. They asked the participants to work together to try to find areas of agreement on very contentious issues where possible. Where it was not possible, participants were told that Meridian would document areas of agreement and disagreement which the Forest would then use to inform its decision. Many participants tried very hard to do just that – they listened carefully to people with differing perspectives, and proposed creative solutions to try to bridge differences. However, there were some whose participation was oriented primarily towards trying to convince other stakeholders and the Forest of the validity of their own views, without really trying to address other interests.

That reality, and the fact that there was inconsistent, variable participation, made it difficult to achieve any level of concurrence, much less consensus. The result was a high level of frustration for a few stakeholders – particularly for some who had recently experienced a process in which a small, select group of members of a representative collaborative had indeed reached consensus. In hindsight, the process would have been better served by a more nuanced message from the facilitation team at the outset, i.e., more explicitly acknowledging that full consensus was not a realistic expectation in this kind of process – particularly on the big tough issues, but still encouraging the quest for common ground wherever possible.

16. **Prepare for larger than anticipated turn-out and first-time attendees.** The first stakeholder meeting to address forest-wide desired conditions was mostly conducted in

three facilitated “break-outs”. As noted above, the meeting was designed with an expectation of relatively small, manageable number of people in each break-out who had mostly pre-registered and attended the orientation meeting. The agenda was crafted on the assumption that the attendees would be able to work through a carefully crafted set of questions for each topic. However, more people attended than had registered ahead of time, and at least one of the break-outs had in excess of 50 people. Also, many of the participants had not attended the orientation meeting in December, and were therefore getting their first exposure to the process. Some people came prepared to make formal statements, not to engage with other stakeholders in moderated discussions. As a result, the group did not get through the agenda and the meeting was chaotic and frustrating for many.

The lesson derived from this experience was to take better account of the fact that in this kind of collaborative, there can be highly variable participation (including a significant number of attendees who do not pre-register and different people at each meeting), and stakeholders who come expecting to make statements rather than to engage in collaborative discussion. Meeting hosts and facilitation teams should prepare for larger than expected turnout, and for many different kinds of participants.

17. **Be clear up front on documentation and products that will be distributed after the meetings.** For this collaborative process, Meridian and the Forest agreed that a non-attributed summary from each meeting was the best way to document the stakeholder input, and this was made clear to stakeholders from the outset. However, there were a few individuals who said that meeting summaries were inadequate without attributing particular comments to individuals. The Forest however, made it clear they were looking for feedback and good ideas from any quarter – without having to tie them to certain people. Also, the only way to ascribe attribution would have been to have every individual identify themselves before speaking, and to record and transcribe the discussions. While this might have been possible in full-group plenary settings, it would have been extraordinarily cost prohibitive as well as impractical given the highly interactive small-group format utilized for most of the process, with up to six small group discussions taking place concurrently. Instead of transcription, there were note-takers at each small table captured key points and recommendations– not every single comment. The attendees were encouraged to look at what was being recorded on flip-charts to make sure important points were recorded, and to immediately correct any mistakes or omissions. They were also given an opportunity to review meeting summaries in draft form and to suggest corrections if they thought anything was missed or inaccurate. This kind of procedure produces notes that are much more efficiently translated into a meeting summary than a raw transcript. It also gives participants a level of accountability for identifying what is most important to convey. The lesson or the future is to be as clear as possible from the outside about the lack of attribution, and the reasons why.

18. **Do not make the E-Collaboration tools so complex as to discourage their use.** As noted in the E-collaboration section above, the E-collaboration tools designed to promote interactive collaboration among stakeholder were not extensively utilized. One reason may have been that some users were frustrated by the format – the result of attempts to make it easy to track particular discussion threads by posting questions under many different topics. Future stakeholder initiatives would be advised to err on the side of simplicity in the way the interface is designed.
  
19. **Consider expanding options for meeting times.** One of the extraordinary aspects of this process was the willingness of so many stakeholders to give up their evenings so they could contribute to a better Forest Plan. When asked, the majority of stakeholders said they preferred week-day evening meetings starting not earlier than 5:00 pm (to accommodate work schedules) and concluding by 9:00 pm. As a result, with breaks, meetings were generally limited to less than four hours. Discussions often felt rushed, even with the relatively limited number of topics on the agenda. For the future, it might be useful to schedule even one longer session – perhaps on a weekend at a critical juncture in the process – that would not be too burdensome, but would provide more time for deliberation

# Appendix A: Options for Electronic Collaboration

Below is a list of e-collaboration tools researched and evaluated for use during the FNF Plan Revision, including descriptions of each the tools, as well as examples of use and pros/cons for many of the tools.

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## Feedback and Comment Mechanisms

### Talking Points Collaborative Mapping (TPCM)

[TPCM](#) is an interactive web-based mapping tool designed to enhance public involvement and collaboration in national forest planning and other forest planning efforts. TPCM melds traditional interest in public involvement with new computer aided technologies, permitting both a greater degree of geographic specificity in public involvement, as well as opportunities for dialogue and learning. It allows public commenters to communicate with each other and Forest Service staff in “real time” discussion, as opposed to traditional collection of public comments. Public users can post comments and photos on a spatially identified area of the map by drawing polygons, lines, and points. A TPCM project page, or landing site, is set-up, managed, and maintained by a “manager,” a role that can be fulfilled by a FNF or Meridian team member.

#### *Examples of Use*

As early-adopters of the U.S. Forest Service Planning Rule revision, the Nez Perce-Clearwater National Forest and the Chugach National Forest utilized TPCM as part of their scoping efforts in the early stage of management plan revisions. While the Chugach NF’s experience was largely positive, forest planners at the site recommended a greater level of publicity, including advertising the link and information for a TPCM project site in a variety of ways within the community in order to promote use by and collect feedback from stakeholders who do not attend revision plan meetings. TPCM has also been used in the Four-Forest Restoration Initiative, the Tonto National Forest, and the Chilly James (Flathead NF) Restoration Plan.

#### *Pros*

- TPCM allows the comments to be associated with geographic locations.
- Both the manager and TPCM users can reply to other posts, allowing the TPCM to serve as an interactive communication tool.
- Comments are self-prompted, reflecting values and opinions, in contrast to specific questions of traditional survey methods.
- The TPCM system automatically collects and stores data into one database, eliminating the need for manual input. This database is pre-formatted to provide a rudimentary statistical analysis of user input.

- The manager can assign “key words” to the TPCM system which will identify and track the number of posts that include those key words. Key words can also be set to recognize and “hide” comments from the public that may be inappropriate or reveal sensitive information. The manager will be able to view and record all feedback regardless of content.

#### *Cons*

- Site management may require frequent monitoring of posts to answer user questions or correct misinformation or misstatements.
- Depending of the goals of content analysis, it may become time intensive, requiring specific staff with strong data analysis skills.
- Creating the map with the necessary GIS layers will require assistance from GIS staff and the use of advanced GIS software.
- Engaging stakeholders to use the tool may be difficult due to intimidation of high-technology or the lack of internet access.
- The purpose of the tool must be made explicit (scoping, public comment, etc.) and caution should be taken to consider its use within the NEPA process.

### **CommentWorks®**

[CommentWorks®](#) is ICF International's web-based software solution for analyzing, sorting, tracking, summarizing, and responding to public comments. Dozens of federal departments and agencies, as well as states and companies, have relied on CommentWorks® to manage and analyze hundreds of thousands of comments on their regulations, guidance documents, environmental analyses, and other types of reports and projects.

#### *Examples of Use*

CommentWorks® has been used by numerous U.S. federal agencies working on environmental assessments to capture public comment in regulatory compliance. Other institutes that have utilized CommentWorks® for public comment processing and analysis include The Transportation Security Administration and the Federal Trade Commission.

#### *Pros*

- This tool allows integration with existing comment collection and document management systems, including the Federal Docket Management System (FDMS), a document management solution with role-based access controls of file folders.
- Stakeholders can be guided to submit more focused feedback through forms that solicit and pre-sort comments by topic, question, or sections of a document.
- This software enables sharing, organizing, analyzing (qualitatively and quantitatively), and documenting public comments through a secure Internet interface.

#### *Cons*

- The software must be purchased. The cost of setup depends on if it is purchased by subscription or installed, and includes the initial set up of the system. The company also offers training and technical support, content analysis, and administrative for an additional fee. Meridian Institute has inquired for further information.

## Crowdbrite

[Crowdbrite](#) is a visual-based software program that serves as a “canvas” for collaboration, utilizing virtual sticky-notes, diagrams, and reports. The program offers online brainstorming sessions, meetings, and workshops/charrettes for team and community collaboration.

### *Examples of Use*

The Sequoia, Sierra, and Inyo National Forests are currently using the software for a Draft Bio-Regional Assessment. The Crowdbrite site states that regional, state, and federal agencies use the software as well as facilitators and public engagement specialists.

### *Pros*

- Unlimited data is saved automatically on a secure server that is backed up daily.
- Crowdbrite has the potential for “real-time” collaboration.

### *Cons*

- Feedback from other users indicated that the “real-time” information sharing software was problematic for some users.
- In situations with many users (>100 participants), the software had difficulty analyzing comments.
- There is a usage fee and is pay-as-you-go. This fee includes training and initial project setup.

## Online Surveys and Forms

Surveys have frequently been used as a traditional method of stakeholder input. As an online tool, a link to online surveys and forms with project-specific questions can be provided in e-mails, on websites, in local media, and on paper handouts. Service options include [SurveyMonkey](#), [Woofu](#), [Zoomerang](#), [SurveyGizmo](#), and many more. For analysis of online survey services recommended for use by non-profit organizations, click [here](#).

### *Examples of Use*

As part of our work supporting the Partnership for Aflatoxin Control in Africa (PACA), Meridian Institute recently used SurveyMonkey to gather comments on a draft strategy document. Meridian Institute also used SurveyMonkey for the Campus Resilience Enhancement (CARES) project, collecting feedback from campus leaders regarding actions that schools have taken to increase resilience. The Tonto National Forest used an online form as part of its plan revision public engagement efforts.

*Pros*

- Surveys and forms are user friendly and easily accessible. People may be more inclined to complete a survey or form because they are generally familiar with the format and process.
- Questions can be targeted to a project's particular needs and comment boxes can be provided for open-ended comments, ideas, and concerns.
- There is at least one free online survey service, and more options are available at relatively low costs.
- Users have the option to complete surveys or forms with their name or anonymously.

*Cons*

- Surveys and forms must be approved by the Office of Management and Budget (OMB) before being released for use, which can be a very time consuming and paperwork-intensive process.
- Posing pre-written, targeted questions on surveys and forms can strongly influence the feedback that stakeholders provide and can limit their expression of personal values, opinions, and ideas.
- Phrasing questions to be as minimally inferential as possible can require much time and thought.
- Open-ended qualitative responses, while allowing more opportunity for open feedback, are extremely time-intensive to analyze.

## CommentManagement

[CommentManagement.com](http://CommentManagement.com) provides web-based tools and processes for managing comment and response portions of public participation, public involvement, and public relations projects. *Confer* is an application of the system that sorts and synthesizes comments into data, graphs, and charts.

*Examples of Use*

*Confer* was developed to manage comments for a large environmental impact statement for the U.S. Department of Energy in 1997. The system was very successful and has been "tried and true" by the private industry and local, state, and federal governments.

*Pros*

- Built to be user friendly and does not require IT staff support.
- Response and review processes are built-in.
- Includes an analytical tool to turn feedback into quantitative data.
- Enforces a tightly integrated review process to ensure that no responses get by without a proper review cycle.

*Cons*

- There is a fee, which CommentManagement emphasizes is very affordable compared to other services.

## Dialogue by Design

[Dialogue by Design](#) specializes in running public and stakeholder engagement processes using online, paper-based, and face-to-face methods. Dialogue by Design prides itself in working closely with its clients to ensure that their goals are realistic and the results will be usable.

### *Examples of Use*

Meridian Institute used Dialogue by Design to collect feedback internationally for AGree: Transforming Food and Ag Policy, a project on transforming food and agriculture policy. Dialogue by Design has a long list of private, non-profit, and public clients including, the U.K. Department of Energy and Climate Change, Environment Agency, and London Waste Action.

### *Pros*

- This platform has the look and functions of a website and can be made simple or elaborate. There can be multiple tabs with background information, links, surveys, and comment boxes.
- Posted responses are visible to the public and are automatically added to a database.
- Surveys can be completed online or filled out by hand and mailed in.
- There is an option for Dialogue by Design to conduct qualitative coding of responses and summarize feedback into a narrative.

### *Cons*

- There is no way to respond to feedback through the system.
- Users need to log in to submit responses. Log-in is not required to only view the site and collected feedback.
- System set-up and management will likely involve extensive assistance from Dialogue by Design.
- Total costs will be \$7,500-\$15,500, with or without feedback analysis provided. Analysis services can be unit-cost only (charged per comment) or day-rate based. Dialogue by Design is based in Europe, which would add international call fees.

## Socrata

[Socrata's Open Data Portal](#) offers citizens a way to access and use public information and review, compare, visualize, and analyze data in real time. Constituents provide ratings and comments around data, maps, text, and charts. Socrata was initially designed to collect and manage quantitative data but can be used to translate qualitative feedback and data into quantitative data, as well.

*Examples of Use*

Socrata's open data platform has been used by Chicago, New York City, Austin, Maryland, Illinois, and other leaders in forming citizen and government collaboration.

*Pros*

- Can create surveys with specific questions and open comment boxes.
- Able to create a page to collect feedback on particular text for people to comment directly within. The amount of text allowed to be posted to one space on the website is limited. For example, a site manager might not be able to post a whole document, but rather a section of the document.
- Comments can be made publicly viewable.
- All comment submissions are automatically input into a database.

*Cons*

- There are service costs.
  - Might be too limiting in the amount of text allowed to be posted and commented on.
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## Social Media

### Facebook

[Facebook](#) is a social networking site that can be utilized to increase awareness of the Plan Revision process. Maintained by Meridian Institute, Facebook could be used to post updates, announcements, maps, documents, and photos, as well as to create events and send out invites. It can also provide links to other project sites and mechanisms.

*Examples of Use*

Meridian Institute has created a Facebook page for many projects, including Community and Regional Resilience Institute (CARRI) a project on increasing communities' resilience to disasters, and AGree: Transforming Food and Ag Policy, a project on transforming food and agriculture policy. Government agencies have used Facebook for natural resource management planning, such as the Coeur d'Alene Lake Management Plan.

*Pros*

- A Facebook page provides the ability to reach out to already active Facebook users who can pass on information to others.
- This is a tool that can increase the potential of reaching younger generations.
- Conversation threads are easily manageable and interactive.

*Cons*

- Used solely, those who are not on Facebook would not be reached.
- Posts can get lost in the large amount of Facebook activity.
- Managing the Facebook page may require frequent Meridian Institute team involvement in order to respond to posts with questions and concerns.

## Twitter

[Twitter](#) is an online social networking service and micro-blogging service that enables its users to send and read text-based messages of up to 140 characters, known as "tweets". The Flathead National Forest currently utilizes an active Twitter account and has been "tweeting" about the Plan Revision Process, for example through announcements of field trips. Twitter will be very useful in posting announcements and links to other resources.

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## Virtual Attendance

### Webinars and Conference Calls

Webinars and open access conference calls are frequently used tools that allow participants to be involved in meetings virtually, thereby removing the travel and time limitations associated with in-person meetings. These virtual meetings can be used to provide information about issues, collect questions, and enable real time dialogue. In the FNF plan revision process, these tools could be used on an ad-hoc basis (e.g., by work groups to engage stakeholders beyond the workgroups in collaborative discussions). In order to reach stakeholders who do not attend plan revision meetings, webinars and conference calls open to the public could be held. With the use of webinars, PowerPoint presentations and documents could be shared visually as well.

*Examples of Use*

Meridian Institute has used webinars on a number of projects as a tool for virtual public engagement. The Inyo National Forest (INF) used public webinars to engage the public and collect feedback for its forest plan revision. While the attendance for these particular webinars was low, about 4-5 people each time, the time and conversation were perceived to be very valuable for the revision plan process. In contrast, during the USFS National Planning Rule Revision, Meridian Institute facilitated conference calls with over 200 participants. The EPA has similar experience with large-scale conference calls and webinars.

## Video Recorded Meetings

Depending on the technology available to the Forest Service, the plan revision meetings could be recorded and streamed live for online viewers. Stakeholders who are not able to attend the meetings in person could virtually join the meeting and possibly send in “real time” written questions and comments. Plan revision meetings could also be recorded and posted online, accessible to all. Whether it is live or prerecorded video, stakeholders who do not attend the meetings will be able to learn more information about the revision plan and process and submit post-meeting feedback and questions.

## External Live Streaming Service

[Livestream](#) provides the tools and a platform to stream live videos and allows viewers to submit real-time comments and questions. Viewers comment by logging in with either a Facebook or Livestream account. The video host can directly respond to comments and questions and act as a mediator throughout the live streaming. The service is advertisement free, offers unlimited usage, and archives videos and comments on a static “Event Page” for each video. The host creates a Livestream account and Event Pages, which can be set up in advance for promotion on Facebook and other websites. Once a Livestream account is deactivated, the videos and archived comment will be no longer accessible after 30 days. The software to operate Livestream is free; however there are monthly service charges and hardware costs:

- \$49/month: Service Fee
- \$495 Flat Rate: [Livestream Broadcaster](#) for HDMI video camera, or [H.264 Pro Recorder for laptop](#)

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## Document Editing

### Microsoft Word Locked “Tracked Changes”

A document in Microsoft Word can be edited collaboratively by locking the “Track Changes” tool. Multiple users can track their changes directly into a document without making any actual changes or overwriting other users’ suggestions. Comment boxes can be added, as well, allowing for more descriptive input. This option is more viable for use by Workshop Groups rather than the open public.

#### *Pros*

- Users can provide feedback to the exact area of interest within a document.
- Comment boxes allow for questions and dialogue, although minimal, between users.
- This tool allows for feedback regarding the technical- and language-based aspects of the plan revision, which not many other tools offer.

### *Cons*

- It can be difficult to interpret tracked changes with too many users and input.
- This option is limited to certain parts of the plan revision process and is less likely to be used to collect broad public feedback.

## **Online Document Comment Tool**

[Crocodoc Personal](#) is a mechanism for uploading documents, in Word or PDF format, for editing and comment. The tool allows individuals to add comments, highlights, drawings, and other markups to documents and images. It has the option of inviting others to collaborate in real-time. It can also be used in conjunction with the content management system discussed above by embedding documents onto a website or blog.

The document comment tool will be useful for obtaining public feedback on documents that have been produced by working groups, and FNF and Meridian staff, and posted to the public site. While there are other comment mechanisms for general comment, this tool will allow for specific feedback associated with various parts of documents.

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## **Websites, Blogs, and Mailing Lists**

### **Urban Interactive Studio**

[Urban Interactive Studio](#) offers a project website platform, called [EngagingPlans](#), to conduct broad-scale public outreach and participation, including background information, project calendars, and surveys. In addition, a plug-in tool, called DynamicDocs, allows work groups and the public to provide input within documents by writing comment boxes directly next to sections of interest. Participants have the opportunity to answer specific prompt questions regarding a document as well as to write open-endedly. A site manager can choose to make the comments public or private.

### *Examples of Use*

[EngagingPlans](#) and DynamicDocs have been used by the private, non-profit, and public sector to collect broad-scale public input on a variety of issues, including policy making.

### *Pros*

- Serves as a one-stop-hub with project information, announcement, and a variety of participation tools including surveys, document feedback, and contact information.
- Once set-up, site manager is able to maintain site with little to no technical support.
- Accessible to the public on multiple devices, including computers, mobile phones, and tablets for viewing and commenting.
- Log-in is not required to make a post. Only a valid e-mail address and a real or alias name are required.

- Comments can be moderated.
- Feedback is automatically added to a database where data can be sorted.
- All participation tools are in HTML5 format, avoiding accessibility issues with software, such as AdobeReader and Flash Player.

#### *Cons*

- Costs:
  - EngagingPlans: \$1,000 set-up fee, \$75/month
  - EngagingPlans and DynamicDoc plug-in: \$3,000 set-up fee, \$125/month
  - Technical support for help outside of fixing website errors/failures: \$125/hour
- DynamicDocs is limited to 15 documents with unlimited comments.
- A system for analysis is not included.

### **FNF's Existing Website (Public)**

FNF's existing website is accessible by the public and provides basic information regarding upcoming meeting dates and times, background information, announcements, etc. Information is delivered through one portal that is linked to all other informational sites and comment mechanisms (ex. online surveys and forms, TPCM, etc.). This site is easily searchable without having a direct URL.

### **SharePoint Collaboration Website (Internal)**

Meridian Institute will set up and maintain this site, and those on the FNF team, Meridian team, and work groups will be able to gain access with a password. This site will contain "working spaces" for each work group, the FNF team, etc. to share, edit, and save.

### **FNF Collaboration Website (Publicly Informative)**

This site is to be set up and maintained by Meridian Institute with detailed information about meetings and field trips, background materials, workgroup meeting agendas and summaries. This site is accessible to the public and will contain links to all other informational sites and comment mechanisms (ex. online surveys and forms, TPCM, etc.). Work group members can share and manipulate documents and post final versions to the Collaboration Website. A potential disadvantage to this site is that it could be unnecessarily duplicative of the FNF existing website.

### **Content Management System (CMS) and Blogging Software**

Content management and blogging software and websites, such as [WordPress](#) or [Weebly](#), are designed as a website with multiple tabs and style options, as well as a blogging platform that allows users to comment and reply.

This site will include detailed information about meetings and field trips, background materials, workgroup meeting agendas and summaries. This site is accessible to the public

and will contain links to all other informational sites and comment mechanisms (e.g. Facebook, Twitter, FNF website, online surveys and forms, etc.). Final versions of documents will be posted to this Website.

## Blogger

Google's free [Blogger](#) page features a complimentary, open-access "[Comment Inbox](#)" and easily links to Google Docs and [Google Drive](#), where documents, spreadsheets, and presentations can be created and edited collaboratively.

### *Examples of Use*

The Nez Perce-Clearwater National Forest used Blogger's Comment Inbox to gather comments regarding its plan revision.

### *Pros*

- Comments will appear at the bottom of the blog and can be threaded; meaning users and the blog manager can respond either generally to the blog or specifically to another user's post.
- There are multiple ways to monitor comments and avoid receiving spam using security settings. Also, there is an option to receive a notification via e-mail when a comment is posted.
- Links to Google Docs can be provided on the blog page, and people can make edits and leave feedback directly within the document.
- Links to Google Drive, where surveys can be filled out.
- A group blog can be created by multiple authors, enabling communication between individuals or groups, allowing Workshop Groups to play a larger role in the blog if preferable.
- All of Google's applications are free.

### *Cons*

- A log-in is required for users who do not have a Google account.
- There is not an automatic comment sorting or analysis tool. Comments would need to be manually added to a database.
- If the page were to be split up into multiple blogs/sections of information, comments would be separated by these different sections. Reviewing and tracking feedback may become difficult.
- There is not a way to directly collect users' contact information.

## USDA Blog

The USFS used the [USDA Blog](#) to provide information to stakeholders and gather several hundred comments during the U.S. Forest Service Planning Rule Revision. The archived comments can be found [here](#). The USDA Blog may be available to use as a platform for the FNF Plan revision. Other blog sites could be further explored as options, as well.

## **Electronic Mailing Lists (ListServ)**

Electronic mailing lists allow a sender to send one email to a list of participants, and then transparently sending it on to the addresses of the subscribers to the list. Stakeholders have the opportunity to choose which specific lists they prefer to subscribe to, thereby receiving information regarding specific topics of interest. These lists can be utilized to announce meetings and events, request information, and provide links to additional resources or web-based platforms, among others.

## Appendix B: Flathead Collaboration Google Group

Meridian Institute created and managed the Flathead National Forest Plan Revision E-Collaboration Google Group. Figure 1 (pg. 44) shows a screen shot of part of the Google Group structure.

The Google Group page was publicly accessible and searchable on online search engines. In order to post a comment or reply on the page, a stakeholder could: 1) log in to their existing Google profile; or 2) create a Google profile using a new Google e-mail address or their existing e-mail address from another domain (e.g. @yahoo, @msn, etc.). Stakeholders were able to choose how their name would appear within the comments and replies they posted. Meridian provided an instructional document with screenshots of the Google Group to show how to navigate and use the page. The instructions were circulated via the listserv and were posted to the Meridian-managed website and the Google Group.

In order to encourage feedback specific to aspects of the plan revision that were identified by the Forest as critical to collect stakeholder feedback on, Forest staff developed informational background documents to describe the current forest-wide conditions (e.g. vegetative composition), management practices of the Forest, and the Forest geographic areas (i.e. Salish Mountains, Swan Valley, Hungry Horse Middle Fork Flathead, North Fork Flathead, South Fork Flathead). Forest staff also developed documents with draft unique roles and contributions, objectives, and desired conditions for the revised plan, and provided prompting questions for stakeholders to consider when submitting feedback on the draft language as shown in Figure 2 (pg. 45). Each of these prompting questions were posted as “discussion comments” that stakeholders could directly reply to, and a link to or attachment of the corresponding informational documents was provided within the post, as shown in Figure 2.

When stakeholders posted comments, Meridian staff was notified via e-mail and then reviewed all comments to monitor whether stakeholders posted any questions to be answered and to ensure appropriate content. One issue experienced with the Google Group was that two posts made by a stakeholder that Google identified as possible spam were held in a “Pending Approval” inbox in Meridian’s Google Group account. When Meridian approved the pending posts, however, the posts were still not visible on the Google Group. Meridian re-posted the comment on behalf of the original poster and contacted the stakeholder directly to explain the situation. Google technical staff was unable to explain the problem or advise Meridian on how to ensure the issue would not arise again. Other than this particular instance, all stakeholders’ comments and replies were immediately posted to the Google Group upon their submittal, allowing stakeholders to participate in multi-way dialogue and Forest staff to review stakeholder feedback in real time.

Meridian Institute and Forest staff explored the use of different tools to make it possible for stakeholders and working groups to provide feedback on a document and/or prepare a new document in a collaborative way (see Options for E-Collaboration document – Appendix A). For example, if Forest staff were to draft language for the revised Forest Plan, stakeholders could provide suggested edits directly within the text of the document, or if a working group of stakeholders wanted to draft a proposal to share at an in-person meeting, they could develop content and make revisions within the same document. The goal was to allow stakeholders to provide input on and/or prepare documents collaboratively (i.e., to see and build upon on another's other's ideas).

Meridian and Forest staff considered using Meridian's intranet to post and store Microsoft Word documents that stakeholders could leave "tracked changes" and "comment boxes" in. With the "restricted editing" feature of Microsoft Word, multiple people could access and make edits to the documents without accidentally writing over each other's suggestions. Any edits made would automatically show as "tracked changes," rather than actual revisions to the original text. However, access to Meridian's intranet can only be granted with an assigned user name and password upon request, such that it is not publicly accessible. Also, when multiple people leave "tracked changes" in a word document, the document can become cluttered and the suggested edits difficult to follow. For these reasons, Meridian and Forest staff decided against using the intranet for document collaboration. Google Drive, previously named Google Docs, was also considered as a publicly accessible tool for document collaboration. With the same concern that a document with revisions from several different people would become difficult to comprehend, Google Drive was not chosen for use in the e-collaboration process either.

Ultimately, it was decided to use the Google Group as a tool for document collaboration. While the Google Group did not provide an avenue for stakeholders and working groups to draft new documents of their own in a collaborative way, Meridian and Forest staff did not identify a need for such documents to be developed within the stakeholder collaboration process. Instead, links to and attachments of informational documents developed by Forest staff were included in posts made by Meridian. As shown in Figure 2 (pg. 45), these posts were made in the form of comments, which stakeholders could view and then directly reply to with their feedback on the documents. The Google Group was publicly accessible and allowed stakeholders to view and reply to each other's input and ideas in real time.

Nevertheless, the level of stakeholder participation on the Google Group was lower than what was hoped for. By the end of the collaboration process, ten stakeholders posted one or more comments to the Google Group. Three of those stakeholders sent their feedback to Meridian or Forest staff and requested that Meridian post their comments to the Google Group on their behalf, as they found the Google Group difficult to use. Low participation on the Google Group may have been because other stakeholders also found the page challenging to use, or perhaps stakeholders preferred to provide their feedback at in-person meetings rather than through E-collaboration.

Nevertheless, several posts were made to the Google Group with substantive feedback on the draft language developed by Forest staff on unique roles and contributions, objectives, and desired conditions for the revised plan. Many stakeholder posts included links to or attachments of articles, opinion pieces, and resources for others and Forest staff to review within the context of the plan revision. Forest staff reviewed all comments that were received via the Google Group and e-mail, and considered stakeholder feedback when drafting language for the revised Forest Plan and when engaging in discussion at in-person meetings.

Figure 1. A screen shot showing part of the homepage and the organization of the Google Group.

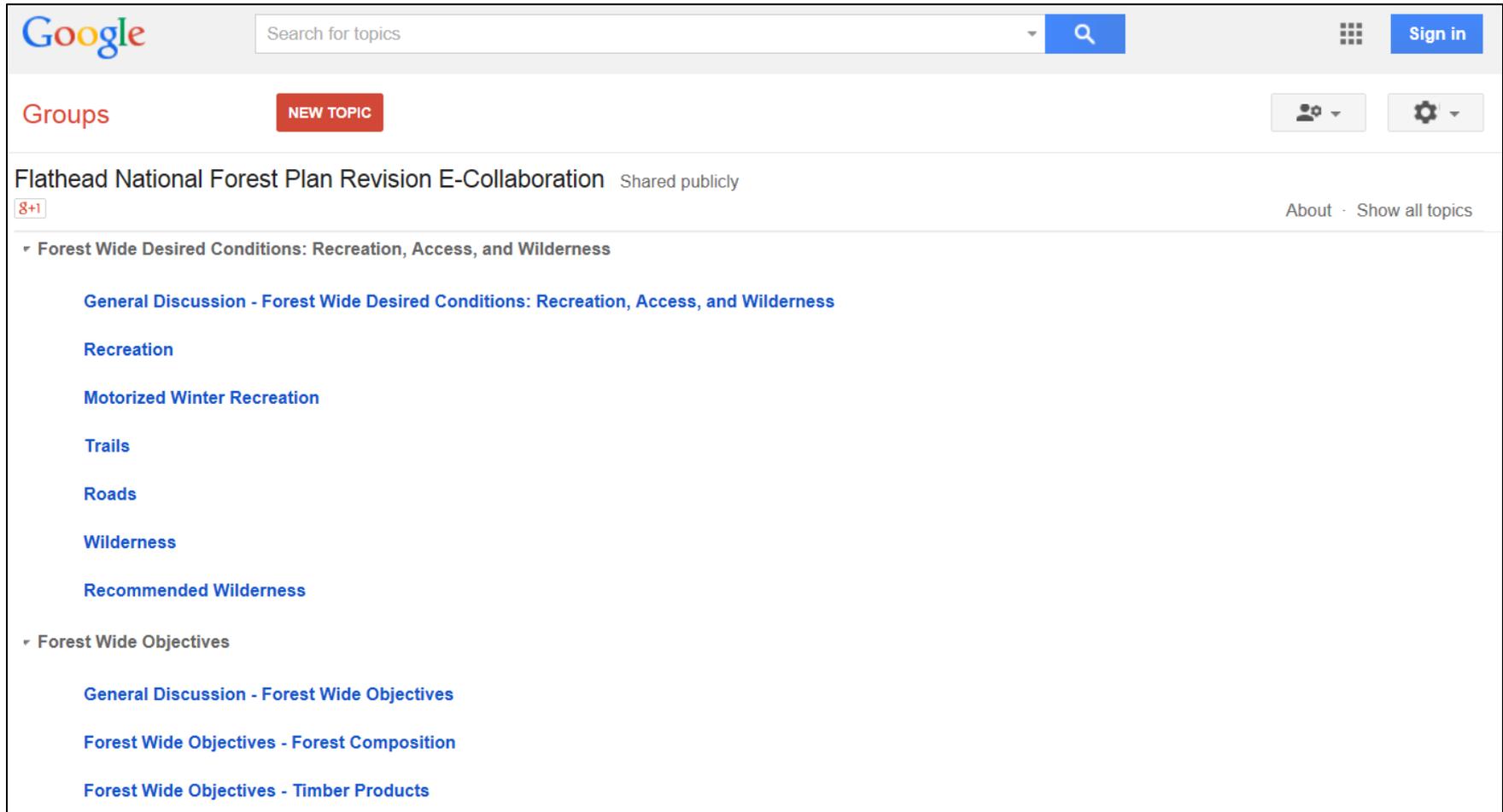


Figure 2. A screenshot showing how questions developed by FNF staff were posted to the Google Group where stakeholders could post replies, as well as responses to each other.

Flathead National Forest Plan Revision E-Collaboration ›  
Desired Conditions - Wilderness: Human Intervention  
1 post by 1 author ▾ 8+1

Wilderness +

No action needed Move

 me (meridianin...@gmail.com [change](#)) Feb 6  ▾

☆ **Question 1:** What is the role of human intervention in the event of ecological processes such as fire, insect and disease, and flooding? See information on wilderness in the [Key Information for Wilderness document](#).

This post has been edited

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