

Best Practice: Creative FS Approach to Travel Planning

Summary

The Cibola National Forest used both public workshops and a collaborative work group in their travel management planning process on the Sandia District.

Keys to Success

- Investment of FS funds in a neutral facilitator and assessment process.
- Establishment of a collaborative work group, in which Forest Service staff participated as members.

“Burning issues and concerns were identified early, providing the time to respond and often resolve. Understanding grew both from within the agency and the public as a result of the relationships that were formed.”

— Nancy Brunswick,
Forest Landscape Architect/
Recreation Program Manager

National Forest Foundation
Bldg. 27, Ste 3
Fort Missoula Rd.
Missoula, MT 59804
406.542.2805
www.nationalforests.org

In November 2005, the U.S. Forest Service published its final rule describing how motorized recreation and travel would be managed on National Forests. The rule emphasizes the importance of collaborative involvement in the planning process of the multitude of communities of interest and place affected by motorized travel. Since then, National Forests have taken a variety of approaches to public engagement in planning around this very controversial topic.

In response to the challenge of designing a collaborative process that also met the public involvement requirements of the National Environmental Policy Act, the Cibola National Forest partnered with the U.S. Institute for Environmental Conflict Resolution. The Institute contracted with a neutral, third-party contractor who conducted an initial series of interviews with agency employees, citizens, agency partners, and tribal, state and local government representatives.

Based on this assessment, the contractor designed a two-part process consisting of public workshops and selected an 18-member work group. Work group members represented a broad diversity of interests and spoke for themselves, not specific organizations. The purpose of the work group was to integrate feedback from the public meetings and review motorized and non-motorized use patterns in order to make recommendations for designated roads and motorized trails on the Sandia District. The work group’s meetings were open to the public, and observers were given the opportunity to comment.

After three public workshops and six work group meetings spanning eight months, the Forest presented to the public a preliminary proposal developed collaboratively by the Forest’s Interdisciplinary Team and the work group. During scoping and Environmental Assessment comment periods, the Forest held two more public workshops and four more work group meetings. The work group helped interpret the scoping letter comments and make suggestions for alternatives.

As of January 2009, the final map had not yet been published, but so far reaction to the designated routes has been generally positive.

Benefits

The work group provided an opportunity for deeper engagement in the planning than possible in more traditional public processes.

Links

Sandia Ranger District Travel Management:

http://www.fs.fed.us/r3/cibola/travel-management/tm_sandia/index.shtml

**Cibola National Forest
Lessons Learned Session
August 9, 2007 9 a.m.-3 p.m.
Supervisor's Office
Albuquerque, New Mexico**

Meeting Summary

Participants

Line Officers: Nancy Rose, Karen Lessard, Chuck Hagerdon, Cid Morgan, Nancy Walls

FS staff: Rob Arlowe, Geoff Holden, Tedd Huffman, Dennis Aldridge, Mike Gurule, Marsha Hagerdon, Cliff Nicoll, Beverly Degruyter, Arnold Wilson, Mary Dereske, Arlene Perea, Roxanne Turley, Cynthia Benedict, Mark Chavez, Nancy Brunswick, Bill Falvey, Eloise Promenschenkel.

Members of the Public: Tom Mayer, Joanne Spivack

Facilitation Team: Kathy Bond, Susan Hayman, Larry Fisher

Overview

Forest Service staff, along with members of the public, evaluated the collaborative process in the context of proposal development for Travel Management Planning on the Sandia District and identified relevant lessons learned to be applied to the next phase on the Sandia District--and to the upcoming projects on the Mt. Taylor and Mountainair Districts. Using the facilitator's presentation of *Process Evaluation: Findings and Observations* as a springboard for discussion, participants looked at what worked and what could be improved in the collaborative process that included seven meetings of a stakeholder work group and four public workshops during a 10-month period, October 2006-August 2007.

Participants agreed that the collaborative process on the Sandia District was a positive experience for both the Forest staff and the public: the process created substance for the IDT to consider in proposal development and also provided an opportunity to develop relationships that are anticipated to endure beyond the scope of this particular project. Participants underscored the importance of developing consistent, readable (jargon-free) communication about Travel Management for release to both internal FS and external audiences that explains the Travel Management Rule, the NEPA process, expectations from the public (and internal staff) in a collaborative process, and a process map/graphic illustrating how public input will be integrated into the decision making process, along with a more rigid timeline. An array of tools and techniques to gather input from the public were offered, as well as suggested approaches to include other local, state and federal agencies. Specific recommendations regarding the composition and use of a work group included casting a wider net for participants and making sure the work group members fully understand their role. Finally, participants discussed the necessity of

designing a meaningful process for future districts that strikes a balance between obtaining meaningful input from the public with the reality of budget, staffing resources and a rigid timeframe.

Process

Kathy Bond and Susan Hayman facilitated the Lessons Learned Session and utilized the techniques of brainstorming and group discussion. Meeting notes were captured by individual notetakers on laptops (Larry Fisher, USIECR and Roxanne Turley, USFS) in addition to the flip chart notes kept by the facilitators.

1. Process Evaluation: Findings and Observations [See attached document: Evaluation Summary.pdf]

The facilitators presented information on the methodology, findings and observations from an evaluation of the collaborative process for the Sandia District. Members of the Sandia Travel Management Work Group, the general public and FS were surveyed electronically; in addition, personal telephone interviews were conducted by Larry Fisher, USIECR, and the facilitators. Eleven members of the work group responded to the electronic survey conducted the last week of July 2007, five members of the general public, and seven staff members of the FS.

In general, findings of the evaluation suggested participation in the collaborative process time increased understanding of the Travel Management Rule; at the end of the day, members of the public and the work group better understood the FS's decision making process and how their input would be used in the proposal development phase. However, the general public was less certain about the FS's use of public comments to better understand uses, values and desires.

An evaluation of various tools/activities suggested specific techniques were viewed differently by respondents. For example, the work group members viewed interactive maps and paper maps as helpful; participants in public workshops viewed Q & A, presentations and large group discussion as most useful; and, the FS staff thought small group discussion, large group Q & A and presentations as most helpful. As opposed to the work group members and FS staff, the general public surveyed was less certain about the value of their contributions or the use of the collaborative process to understand mixed uses, trade-offs and conflicts.

The combination of the work group, public workshops/comments and the engagement of FS staff were viewed as key factors to the *success* of the Sandia Travel Management project to date. However, designation of motorized travel is a polarized issue and thereby it is difficult to find common ground--and a common definition of *success* or *satisfaction*. Generally, there was cautious optimism among respondents that this process would lead to a better outcome, but the public's determination of satisfaction per se will be contingent upon the final outcome--the map showing designated routes, trails and areas.

II. Group Discussion

A. Communication Plan

Based on discussion of the process to date on the Sandia District, participants suggested developing a communication tool kit for use in other districts; this tool kit should include a one-pager explaining the Travel Management Rule, a scaled down version of the NEPA process, and a proposed timeline with identified milestones, along with a link to relevant websites. Participants underscored the importance of developing consistent, readable (jargon-free) communication about Travel Management that emphasizes 1) how the project will affect the public's motorized use, 2) how the public can be engaged and at which points, 3) the sideboards/constraints. It was suggested that communications be field tested by non-FS individuals before release in order to ensure clarity.

B. Tools and Techniques

Meeting participants suggested a broad spectrum of approaches to reach members of the public--and other governmental agencies, e.g., U.S. Game and Fish. Examples of suggested methods include the utilization of data lists/listserves from the SO and districts (including adjacent landowners and special use permittees), letters to area residents, use of existing social and organizational networks, local government, fliers at community distribution points, newsletters, and paid display advertising.

C. Sandia Travel Management Work Group

Specific recommendations regarding the use of a work group in future districts included casting a wider net for diverse participants and making sure the work group members fully understand their role and the FS's expectations. Regarding the work group composition, there were suggestions that personal knowledge of the routes/trails and areas should be criteria for participation. Up-to-date maps, identification of resource concerns, communication of administrative guidelines and sideboards should be shared with the group upfront, along with a clear picture of how information generated from the work group process will be integrated with other input to help in proposal development. An appropriate use of the work group may include: 1) providing input, 2) validating the preliminary proposal, 3) informing, providing feedback, 4) networking and serving as a conduit of communication.

One participant offered the USIECR and Blue Ribbon Coalition's principles of collaboration to be used as a guideline for utilizing a work group in a collaborative process. They include:

- 1) Balanced representation
- 2) Professional facilitation
- 3) The "product" of the process should be clearly identified at the beginning
- 4) Decision process should be clearly identified at the beginning
- 5) Agency must clearly state how it will utilize the product

As participants discussed, the work group design element is contingent upon the situation and needs in the relevant district, including the recommendation of the District Ranger, and staff and budget resources.

D. Public Workshops

Improvement to the use of public workshops in the collaborative process included: 1) “homework” distributed electronically to members of the public prior to meetings to focus participants on substantive comments, 2) a brief orientation of NEPA at the beginning of each workshop, 3) a pre-workshop orientation for participants who had not attended previous meetings. Discussion also focused on the two-way education/sharing information component of public meetings and the value of hands-on, interactive activities where FS staff and members of the public have the opportunity to share information about use, preferences and values. Participants reiterated the need to continue to reach out to the public with a clear, concise message about how its participation will help shape the designation of motorized routes, trails and areas.

E. Readiness

Participants discussed the need for districts to be as prepared as possible before embarking on a Travel Management project. Elements that should be in place before beginning include: 1) a starting point map (INFRA database), 2) FS inventory of existing routes, trails and areas, 3) knowledge of previous decisions (e.g., road closures), 4) resource layers (hydrology, soils, wildlife, archeology), and 5) knowledge of current management (e.g., special areas, decisions). Last but not least, the district needs to have a committed allocation of staff and budget resources to carry through the lifetime of the project.

III. Next Steps

The facilitation team will conduct a situation assessment of the Mountainair and Mt. Taylor Districts in late October-November and will present key findings and a proposed process for both districts to the FS. Lessons learned from the collaborative process on the Sandia District will be applied to design considerations as the Travel Management Planning moves forward to the next Districts.