

# Washington State Coordinated Resource Management

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**HANDBOOK 2006**

5th Edition



*Partnerships for Stewardship*

# Washington State Coordinated Resource Management Program

*“Empowering local people to solve land use and natural resource issues together, through collaborative problem solving.”*

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## CRM Assistance Includes...

- Helping you decide whether a collaborative process is the best means to address your local concerns.
- Identifying stakeholders, partners, and the resource assistance needed for your project.
- Outlining the logistical elements necessary for launching a successful collaborative process.
- Assisting you in locating a skilled facilitator, if needed.
- Helping you find funding sources and in-kind resources for your identified projects.
- Locating key people who are willing to share their experiences and successes with you.
- Mentoring key players in your collaborative group.
- Troubleshooting specific problem areas and contentious issues that may arise.
- Providing training opportunities in facilitation, collaborative processes (CRM), and grantwriting.

The Washington State CRM program is here to assist you! We encourage you to contact us by phone or email with your questions about implementing collaborative group processes.

**Contact us: CRM Program, Department of Natural Resource Sciences,  
Washington State University, P.O. Box 646410, Pullman WA 99164-6410**

### **Thanks to California CRMP!**

We thank the California Resource Management and Planning Council for sharing their CRMP Handbook with us. Several of the appendices and some of the narrative text were excerpted and annotated from their handbook. You can reach the California CRMP program, as follows: Phone 916-457-7907. Website: [www.crmp.org](http://www.crmp.org) Email: [crmp@carcd.org](mailto:crmp@carcd.org)

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# Washington State Coordinated Resource Management HANDBOOK

**CRM MISSION:** *To improve resource management by providing support and technical expertise in the development and implementation of coordinated resource management through community-based, locally-led collaborative processes.*

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## INTRODUCTION

Collaborative group processes can be used to bring people together, improve communications, and reduce conflicts. The Coordinated Resource Management (CRM) process serves as a model for many types of collaborative, voluntary, locally-led activities that lead to implementation of on-the-ground projects to enhance natural resources.

**Consensus** is the cornerstone for most CRM processes. Typically decisions are made by consensus. The collaborative process allows issues to be fully aired, allows all members to have input, and insures that everyone has equal voice and responsibility, all of which makes consensus possible.

The basic concept underlying CRM is that coordinating resource management planning across ownership or management boundaries and jointly implementing field activities results in improved resource condition, assists local people in meeting their objectives and minimizes conflict among land users, landowners, governmental agencies and interest groups. By using this approach, resource problems can be addressed and solved effectively. This happens because decisions involve local stakeholder input and ideas, and group efforts and resources are applied to a specific geographic area. While taking part in a collaborative process, each land owner and resource manager retains responsibility for decisions involving their ownership.

The CRM process operates on the local level, but can have wide-ranging influences. The philosophy behind CRM is that those who live and work on a given piece of land are the people most capable of developing and imple-

menting sound plans for its use. Experience has shown that people with diverse viewpoints who voluntarily meet as a planning team will find common ground as they interact with one another and have a chance to observe resource problems firsthand. Through discussions and field tours, landowners, users and resource managers learn to understand and respect each other's viewpoints. Although members of the group may have differing interpretations of natural resource issues, the CRM process can help them realize they also have a common commitment to the continued health and productivity of the land and its resources. The end result is constructive resource management problem-solving through cooperative resource planning.

The CRM process can be used effectively in practically any resource management situation, i.e. to bridge gaps among private landowners, government agencies, and other resource users. It is particularly appropriate for areas where local resource management issues involve lands under more than one ownership or jurisdiction. Although the CRM process is often thought of as a way to resolve conflicts over land use, it can be equally effective in improving communications and coordinating management activities among plan participants with diverse interests even when there is no conflict. Generally, all decisions are made by group consensus and no votes are taken. Consensus decisions result in a successful CRM plan that will be strongly supported by every member of the planning group.

## PURPOSE OF THIS HANDBOOK

This handbook is a guide to assist the reader in carrying out a collaborative CRM project. It

describes ten steps used in developing a plan and provides sample forms in the Appendices. These forms were developed to assist local groups in working through the process, reaching consensus on resource issues, and developing a sound course of action; their use is optional. Local planning groups operate under their own leadership and direction. Groups can form and develop coordinated management plans completely on their own or, if they choose, can ask for help from the CRM program or other outside sources. Contact information for the CRM program is provided inside the front cover of this handbook.

### **The 10 CRM Steps**

1. **Recognize the opportunity for a collaborative problem solving approach and get organized.**
2. **Conduct the first meeting; invite area land owners, resource managers, and others to participate.**
3. **Define the geographic boundaries of the planning area.**
4. **Consider multiple resource issues and collect existing data.**
5. **Identify individual participant's objectives and problems—giving consideration to all resources.**
6. **Develop actions to achieve objectives.**
7. **Create and re-evaluate plans to ensure that all problems and objectives are considered and addressed.**
8. **Devise a field monitoring system and schedule annual review sessions.**
9. **Implement the plan with field projects.**
10. **Annually review monitoring data and progress, modify plan as needed.**

Using these CRM steps will result in a plan that provides the following:

- A description of the area, including land ownership, resources and features

- A list of land and resource management objectives that all parties have contributed to and agree on for the area
- A list of management activities or actions that will achieve each objective
- The location of each project and practice
- A sequence of activities that will be implemented
- The approximate timing or schedule for beginning and completing the projects and practices
- A commitment from the responsible individual to accomplish each activity
- A means for re-evaluation of the overall plan and developing new strategies for adapting it to new problems or opportunities and changing conditions

Each local CRM group is independent and will address a unique set of problems, opportunities, resource situations and participant objectives. With the information listed above, each planning group member can go forward with the part of the plan they are responsible for—knowing how their project contributes to the entire coordinated effort or “big-picture.”

## **IMPLEMENTING A COLLABORATIVE GROUP PROCESS**

### **Step 1: Recognize the opportunity for a collaborative approach and get organized.**

**The Opportunity:** The CRM process usually begins when someone recognizes the need to address existing and potential resource management issues. The process can be initiated by an individual, group, private landowner, organization, or agency. Individuals or organizations can contact the CRM program (contact information inside the front cover of this handbook), the local Conservation District office, or one of the other Washington State CRM Partners.

**The Stakeholders:** Identify all individuals, interest groups, and agencies that could potentially be affected by improvements to the resource or discussion of the issues. Include all landowners and managers within the

planning area, along with local representatives of all governmental natural resource entities. In addition, people with expertise in particular resources to be considered may be wise additions to the group. Ideally, those present should have decision-making authority for the group or agency that they represent. Through a statewide *Memorandum of Understanding*, eleven public and private entities have agreed to cooperate in Coordinated Resource Management activities throughout Washington State (Appendix C). The CRM program may be able to help engage them in collaborative efforts throughout Washington. A comprehensive group ensures all ideas are expressed, resulting in a stronger plan based on solutions developed by the stakeholders. Final participation of all parties, however, is strictly voluntarily. Success will still be possible even if some affected parties choose not to participate.

**Washington State CRM Partners**

- USDA Forest Service
- USDA Natural Resources Conservation Service
- USDI Bureau of Land Management
- Washington Association of Conservation Districts
- Washington Conservation Commission
- Washington Department of Agriculture
- Washington Department of Ecology
- Washington Department of Fish and Wildlife
- Washington Department of Natural Resources
- Washington Rangeland Committee
- Washington State University Extension

**Step 2: Conduct the first meeting; invite area land owners, resource managers, and other interests to participate.**

**The First Meeting:** The first meeting of the CRM planning group should occur at a neutral location such as a community center or Conservation District office. Start by sending

an invitational letter describing the nature of the meeting to all identified stakeholders:

- Explain why Coordinated Resource Management is being considered
- List, in general, the major issues that may be considered
- Identify the proposed geographic area initially being considered
- Outline how the planning process might proceed
- Include a list of people invited to the first meeting; indicating that participation is voluntary
- Give the date, time and location for the meeting

To reach all interested people in the community, send a news release (see Sample Document A for a Sample News Release) to the local media, distribute fliers or post them in public facilities and on bulletin boards.

**Logistics and Agenda:** Typically at the first meeting, a principal meeting planner with experience in facilitating group planning and neutral ties to the expected issues can act as interim chair, but the group should then select a chair or group facilitator, agreed upon by all participants. In addition, a note taker should be designated to keep an official record of each meeting, including documentation of major decisions and copies of all handouts and visual aids.

Some of the things to be done at this first meeting include:

- Clarify the purpose of the meeting and CRM process
- Conduct a round-robin of self introductions during which participants briefly summarize their responsibility and particular interests
- Outline the agenda and ask for group approval and input on adjustments
- Summarize the collaborative CRM process to be used and describe the results and outcomes that can be anticipated

- Describe the proposed planning area boundary using a visual map and group input
- Make sure all visual aids are of appropriate size and quality for the size of the group
- Summarize the actions taken in the meeting
- Wrap up with an “around-the-room” response to these questions: What is your opinion of this meeting? Did it accomplish your expectations? What did we miss?
- Set the date, agenda, and purpose for next meeting and define what is to be accomplished by whom prior to that meeting

See Sample Document B for a complete checklist of things to be done **prior** to the first CRM meeting. In addition, Sample Document C contains a sample first meeting agenda.

**The Facilitator:** Chose someone to run the meetings. A facilitator trained in moderating meetings and keeping a group on task may be useful to lead your process. Attributes of a good facilitator include professional compe-

tence in resource issues and the ability to work with people to achieve consensus. In particularly difficult situations, a facilitator with no perceived bias may be necessary, but usually the planning group can agree on a local facilitator who will remain impartial when running the meetings.

**Ground Rules:** Early in this process, the group should collaboratively develop, commit to, and document ground rules. This helps create healthy, productive communication habits, trust, and a sense of safety when discussions get intense. Ground rules provide group members with a non-judgmental way of requesting communication changes when ground rules are being tested. Creation of ground rules may be the group’s first collaborative success and models the process they are using. A common understanding of the level of consensus expected should be determined. Sample Document D provides Sample Ground Rules for Collaborative Group Processes.

**Avoiding Gridlock:** The facilitator should maintain the momentum of the decision-

## ATTRIBUTES OF EFFECTIVE FACILITATORS

*The facilitator often plays a very important role for your planning group. This person will assume responsibility for setting the tone, reducing conflicts, and efficiently moving the entire group forward in decision-making.*

### An Effective Facilitator:

- Creates a safe working environment in which members can contribute their thoughts and ideas
- Gets agreement through consensus on desired outcomes/agenda
- Suggests ways to proceed and checks for agreement, as a process advocate
- Makes sure everyone has a chance to participate
- Promotes respectful listening
- Keeps discussions and interactions orderly and on track
- Ensures that time is monitored and information is recorded
- Listens and observes
- Defends others from personal attack
- Remains neutral and does not contribute content ideas or evaluate group members’ ideas
- Knows when and how to get others to perform the facilitating and recording functions
- Balances process and content focus

making process. If the group is not able to reach consensus on a difficult objective, the facilitator should move to postpone a decision on that issue and move on to the next objective. It is important to reach agreement on a few issues so the group will feel a sense of accomplishment. Re-visit and discuss difficult problems at a later date. Experience has shown that as the group members develop trust in each other, consensus on most issues can usually be achieved.

When gridlock does occur and issues cannot be resolved, the following suggestions are offered:

- Take a cooling off period—break for 15 minutes
- Set issues aside temporarily
- Assign a subcommittee of the group to work on the issue, and report back
- Hold a field tour so everyone can look at an area at the same time
- Bring in a speaker with specific expertise in the ecological bottom line issue
- Separate the people from the problem

In addition, problems may develop that are highly technical, need extensive research, or are beyond group's authority or expertise. When these occur, the planning group may want to handle them by separate subcommittee. Do not let the planning process get "sidetracked" on complex and/or controversial issues, or those beyond the planning objectives. Form a subcommittee to gather facts and propose alternatives for consideration by the entire group.

## **GROUP EFFECTIVENESS EVALUATION**

Evaluate your group's effectiveness and diagnose any problems using the following checklist:

- \_\_\_\_\_ Are the goals clear and understandable to the group members?
- \_\_\_\_\_ Are the goals perceived by the members as meaningful, relevant, and realistic?

- \_\_\_\_\_ Is assistance provided to help group members resolve their concerns about their roles? (What is expected of them? How much responsibility do they have?)
- \_\_\_\_\_ Does the group have appropriate resources for dealing effectively with tasks (such as member knowledge, background material, access to outside resources)?
- \_\_\_\_\_ Are basic issues discussed openly, directly, and respectfully?
- \_\_\_\_\_ Do members communicate effectively? Do they listen with the goal of understanding? Do they test their understanding by rephrasing?
- \_\_\_\_\_ Are leadership responsibilities clearly delegated and accepted by the group?
- \_\_\_\_\_ Does the group have effective decision-making mechanisms and has it agreed upon them?
- \_\_\_\_\_ Is the interaction oriented toward objective data gathering and problem solving?
- \_\_\_\_\_ Are conflict and disagreement confronted openly and worked through fairly?
- \_\_\_\_\_ Is there adequate opportunity for individual members to meet some of their own needs (such as recognition, belonging, status, or appreciation)?
- \_\_\_\_\_ Is each person focused on the task at hand and participating productively in the process?
- \_\_\_\_\_ Does the group spend part of its time focusing on its own process as well as the assigned tasks (such as how the group process is working, or members' concerns about how the process functions)?
- \_\_\_\_\_ How would you describe the climate in group meetings (cold/friendly, supportive/antagonistic, relaxed/tense)?

### **Step 3: Define the geographic boundaries of the planning area.**

**Defining Boundaries:** Boundaries should be logical and recognizable, and based on resource issues, community interests, and

geographical considerations. For example, sub-watershed boundaries, vegetation, and ridgelines are commonly used for this purpose. As a rule, the area should include all private and public lands necessary to obtain solutions to identified problems.

**How Big or How Small:** Be careful not to make the planning area too large or too small. If it is *too big*, the plan can easily become so complex and lengthy that it may never be completed, and the team members may have difficulty finding enough time to meet and work together. An entire county, for example, would probably be too large. For sizable areas, it may be appropriate to form more than one local planning group. These groups may want to cooperate on objectives and actions which extend beyond the boundaries of any one area and work individually on their own unique problems. Another way to handle large areas is to have one local planning group that develops sub-committees to assume responsibility for various parts of the overall plan. At the other extreme, a planning area that is *too small* may result in some problems not being solved because their causes lie partially on lands outside the planning area. Again, time limitations may not allow committee members, especially agencies, to participate in many small planning groups.

#### **Step 4: Consider multiple resource issues and collect existing data.**

**Consider Multiple Resource Issues:** When undertaking a CRM process, groups are encouraged to consider all natural resources within the chosen geographic area. This strategy will eliminate the need to start a brand new CRM process when, for example, the “salmon problem” is resolved and a “mining” or “timber issue” is discovered. It makes the most sense for everyone involved to participate in one comprehensive process that addresses all resources. The participants then will feel that their time invested in the planning and implementation process will be used most effectively and efficiently.

**Coordinating with Other Planning Efforts:** It is a good idea for each collaborative group to have a strong awareness of other planning

efforts underway within the designated geographic area. It would be wise to check with all of the following applicable entities to see what efforts they have underway that may impact the CRM group’s efforts and outcomes. These entities may also be able to provide additional resource data to augment CRM planning efforts:

- Federal agencies
- State agencies
- County government
- City government
- Conservation district
- Irrigation district
- School district
- Tribes
- Other

**Collect Data:** Collect or create maps with enough detail to show important features. Other useful materials, including resource inventory data, soil surveys, hydrologic studies, environmental impact statements, local land use plans and aerial photographs, should be accumulated. Agencies and other entities taking part in a local CRM group may be able to provide much of this information. Form 1 provides a Resource Consideration Checklist. It is recommended that each collaborative group go through the checklist together and brainstorm new resource issues specific to the local area. Continue to assemble additional information throughout the life of the plan. Form 2 provides a Checklist of Planning Resources to be gathered to ensure all relevant resources have been examined. The planning group should brainstorm additional sources of information relevant to the specific project.

#### **Step 5: Identify individual objectives and problems—give consideration to all resources.**

**Identifying Problems, Issues, and Objectives:** Once the group is organized and the planning area defined, the work begins. Most meetings should include the entire planning

group even if some parts of the plan may be done by committees. Begin the collaborative process of “issue identification” by brainstorming (see Form 3) an Issues and Concerns List that is specific to the chosen geographic boundaries. Each person attending should be given a chance to discuss and list their issues and concerns. Next, brainstorm a Management Objectives List that encompasses each of these issues (see Form 4). Planning will be easier if the objectives listed are as specific as possible. “Improving the ecosystem” may be something everyone agrees on, but it is so general that the planning group will have trouble figuring out how to accomplish it or measure results. In contrast, objectives like “reduce siltation” and “increase wood utilization” are measurable.

It does not matter which form is done first. In fact, it may be best to put up two big sheets of paper or divide a blackboard in half and make both lists at the same time. This may take several meetings. It is important that no one’s objectives or concerns be left off the list. Include every suggestion, even if others disagree. Do not worry about ideas or objectives that seem controversial or contradictory. This is a process aimed at getting everyone’s issues and ideas listed. They will be considered in detail later. Where possible, quantify objectives in terms that can be measured.

The list of problems and list of objectives will tend to match, e.g. if low water quality during spring runoff is a problem, increased vegetation density along stream channels to reduce siltation may be listed as an objective; and if adjustments in annual allowable “cut” (harvest) is listed as a problem, improvements in tree growth rate and wood utilization may be listed as an objective.

### **Step 6: Develop action and funding plans to achieve objectives.**

**Brainstorming Management Actions:** The next step is for your group to work out management activities and actions needed to achieve each objective identified on Form 4. Use the Proposed Actions Worksheet, Form 5, to do this. Write each objective at the top of one page and then brainstorm as a group the

actions proposed to achieve this objective. It is desirable to list all actions suggested by each member of the group, which would lead to accomplishing the objective.

**Developing Specific Management Objectives:** After completing one Form 5 for each objective, go back through each list and delete, by *consensus*, those actions which require more resources than available, are too time consuming and/or expensive, or in other ways are not practical. This might best be done at the next meeting, so that everyone has a fresh perspective and open mind. Then, from the remaining list, begin selecting actions which are practical, workable, and that all agree will solve the problem. Do not overlook innovative suggestions that may work. When this is accomplished, list the actions in a logical order so they lead to accomplishing the objective. For each objective, indicate how progress toward meeting it will be measured. This may take a long time and a lot of discussion. Some of it may be done by committees. Field trips may help resolve difficult conflicts and dispel misconceptions about the resources or features at a particular site. A planning group may develop and discard several different lists of actions for each objective before all agree on one that will do the job. Do not be concerned, even at this point, if some objectives will seem to contradict each other. As people meet and learn one another’s concerns and management goals, constructive, innovative solutions may surface to achieve objectives that initially appear contradictory. If not, compromise may be possible.

**Preparing the Action Worksheet:** Next determine each participant’s role in the action plan and a time schedule for attainment. To accomplish this, look at each objective and the proposed actions your group listed earlier on Form 4. Working with the planning group, fill out an Action Worksheet, Form 6, for each proposed action. Be sure to assign these actions to people who are both willing and able to carry them out. Some may be simple and take only a short time, while others may be complex and longer to organize and complete.

**Funding the Plan:** The plan should encompass funding for preparation of detailed plans,

environmental evaluation, and field implementation. It should also allow for review and modification of activities, to best meet objectives. Costs may be shared. Funding considerations, however, should not limit identification of problems, issues or potential actions. Using contacts made through the planning group, allocate resources, request grants, or find creative funding to put your plan into action. The CRM program may be able to provide you with leads on potential grant funding.

## Is It Time To Call A Meeting?

No—if you still need to . . .

- Organize large amounts of data
- Write a report
- Disseminate large amounts of information that might be better read individually
- Communicate on small issues that might better be handled by telephone or Email

Yes—if you need to . . .

- Communicate critical information
- Define problems and issues
- Exchange points of view
- Gather information
- Generate lots of ideas
- Evaluate alternatives
- Make decisions that are well-supported
- Develop plans
- Enhance team spirit and cooperation

So, it is time to have a meeting.

Here are some tips to help the meeting go well:

1. *Start on time*, no matter what. If you can do something in your introduction that latecomers will be sorry they missed, all the better.
2. *Be enthusiastic*. It's contagious. If you seem excited about accomplishing your goals,

others will be, too. Conversely, if you take a lackluster approach, others will follow suit.

3. *Use body language* that shows you know what you're doing. Sit tall and look at people directly.
4. *Speak with authority*. If you are prepared and know your stuff, you've got it made.
5. *Don't pontificate*. Keep the meeting moving with questions, discussions, and probes—keep it on track.
6. *Avoid the seven deadliest sins of meeting leaders*: resenting questions, monopolizing the meeting, playing comic, chastising someone in public, permitting interruptions, losing control, coming unprepared.
7. *Orchestrate and pace* the meeting with an agenda. Call on upbeat people, avoid lulls, keep participants focused on the goal, and invite everyone to give input.
8. *Be diplomatic and considerate*. Listen carefully.
9. *Use humor* (not jokes) that comes naturally from the exchange.
10. *Praise people*. Thank them for coming. Let them know you appreciate that they care about the issue.

Adapted from Elayne Snyder, *The Art of Running a Meeting*, California Department of Fish and Game, Sacramento, CA.

## Step 7: Create and re-evaluate the CRM plan to ensure that all problems and objectives are considered and addressed.

Develop and review a draft CRM plan. The plan should include the following key elements:

- Name of the group, location, and area involved (land ownership, including acreage)
- List of participants
- A brief description of the planning area, including a map

- Resource uses in the planning area
- A list of concerns and issues
- Other issues and opportunities that have been identified
- Stated objectives
- Actions and implementation strategy for each objective
- Monitoring procedures for use in adaptive management
- Signature Page for Final Plan Agreement (see Sample Form 7)

**Reviewing the Draft Plan:** After creating a draft, the group should review the over-all plan. Re-check the list of issues, concerns, and proposed solutions to ensure that each one has been addressed. Review the plan for inconsistencies and contradictions, and revise it as needed. When the planning group agrees that the plan is workable, the draft plan becomes a functioning Coordinated Resource Management plan.

**Signatures of Commitment:** Finally, everyone involved signs the last page. This signifies agreement and willingness to carry out tasks for which each has accepted responsibility.

**Step 8: Devise a field monitoring system and schedule follow-up review sessions.**

You may want to consult experts to help devise appropriate ways to monitor the results of your work. Include how monitoring will occur, by whom, and when, in your plan.

**Step 9: Implement the plan with field projects.**

**Go forth and do what your group has outlined in its plan!**

**Share Success:** Consider sending news releases to the local media highlighting your accomplishments to keep the community aware of progress. Also you may want to energize the people involved in the CRM process and enhance community interest by

having a “field day” or “demonstration day.” Invite the community into the field to view the project first-hand. This offers an excellent opportunity for people to see what is occurring and encourages face-to-face communication between all constituents.

**Step 10: Annually review monitoring data and progress; modify plan as needed.**

Periodic review sessions should bring most plan participants back together to reexamine problems, objectives, progress, and recognize successful accomplishment of activities (see Periodic CRM Plan Review, Sample Document E). If conditions have changed (e.g., change in private land ownership, new laws passed or other problems or opportunities), the plan may need to be modified. Planned activities often take more or less time than anticipated, in which case schedules may need to be changed. Plans should remain flexible enough to take advantage of special funding opportunities or adjust to unforeseen circumstances (e.g., new federal programs, a year of drought). Updates, changes, and additions should be made to keep the plan current. Also, work planned for next year should be reviewed and commitments reaffirmed. Regular reviews and updating maintains the plan’s relevance, effectiveness, momentum, and participant interest. Long-term success may depend on annual reviews and keeping the plan current and relevant.

## **For Further Reading:**

Association for Conflict Resolution, <http://www.acrnet.org/about/CR-FAQ.htm>.

Conflict Research Consortium, University of Colorado, <http://conflict.colorado.edu/>.

The Conflict Resolution Source, <http://v4.crinfo.org/>.

Department of Veterans Affairs Office of the Dispute Resolution Specialist, <http://www1.va.gov/adr/page.cfm?pg=48>.

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# **APPENDIX A**

## **COORDINATED RESOURCE MANAGEMENT SAMPLE DOCUMENTS**

*Sample News Release*

**News Release**  
**For Immediate Release**

**Date:** (month/day/year)

**Contact:** (name and phone number of person for the newspaper to call for more information)

**Join Us for a Public Meeting**

*(The first paragraph should include who, what, where, when and why.)*

For Example:

The public is invited to attend a meeting to discuss the future of Big Sky Watershed. This meeting will be held at the XYZ Community Center on Friday, 00 February 2006 from 7:00 p.m. to 9:00 p.m. to discuss current use and management of the stream corridor running from Townville to Lake Silver.

*(The second paragraph should give a bit more detail about the goal of the meeting and mention of who should attend and why.)*

The focus of the meeting will be a discussion of resource issues in this watershed and the use of coordinated resource management and planning to achieve success. Attendees are invited to join the discussion and state their concerns. This meeting is particularly important for community members and civic leaders who are concerned about the Big Sky watershed and would like to get involved in improving this natural resource. The meeting will be of interest to people with homes along Gold Creek.

*(Note any additional information in the final paragraph.)*

For more information, please call IMA Resource at 123-4567.

## Meeting Checklist

### Checklist of Things to Do Prior to the First Collaborative Group Meeting

- \_\_\_ Assemble a small planning committee to help pull together the first meeting.
- \_\_\_ Identify potential stakeholders and develop a mailing list.
- \_\_\_ Set the time and date for the first meeting.
- \_\_\_ Find a neutral location for the meeting.
- \_\_\_ Develop a meeting agenda. Include an explanation of the issue(s) that led to the meeting being called.
- \_\_\_ Make arrangements for a meeting facilitator.
- \_\_\_ Identify someone to chair the first meeting.
- \_\_\_ Plan to have a recorder present to take accurate notes.
- \_\_\_ Send a letter or announcement to potential stakeholders announcing the first meeting, 2–3 weeks in advance.
- \_\_\_ Prepare for audio-visual needs by having flip charts, projectors, large felt markers, and sign-in sheet for attendees.
- \_\_\_ Create a map showing the *proposed* geographic boundaries to be encompassed by the planning effort.
- \_\_\_ Collect readily available data and information about your proposed planning area.
- \_\_\_ Assemble and photocopy handouts for meeting.
- \_\_\_ Have nametags and sign-in sheet available.

# Sample First Meeting Agenda

1. Welcome participants and make introductions.
2. Make a clipboard available as people enter for sign-in of name, address, phone, email, and organization. Use this to start a permanent mailing list.
3. Describe the purpose of meeting and action taken to date.
4. Designate:
  - The meeting chair
  - The meeting facilitator
  - The meeting note taker.
5. Define the collaborative process to be used, describing the results and outcomes anticipated.
6. Propose geographic boundaries. Initiate group discussion for annotation of boundary lines.
7. Brainstorm “the issues” involved (*this list will be re-visited and honed at a future meeting*).
8. Gain participant feedback and commitment. Give each person a chance to express support, doubts, and fears about the possibilities for this process and an opportunity to share its responsibilities:

Why did you come today?

What issues concern you most, and why?

Are you willing to commit to future participation as a member of this group?
9. Brainstorm names of other stakeholders who should be invited to participate.
10. Determine action items and people responsible for accomplishing them prior to the next meeting. For example: gathering maps and data, inviting new participants, organizing meeting logistics, distributing agenda and minutes.
11. Set the agenda for next meeting.
12. Set the date for next meeting.
13. Close with final comments and adjourn.

**Note:** Provide ample time for individual input and comment. Promote respectful listening. Look for people who have not spoken or expressed ideas, and call on them specifically. All present need to be included and heard.

## Sample Ground Rules for Collaborative Group Process

1. Everyone who participates needs to be “solution oriented” toward achieving consensus. We do not place blame. Every member is responsible for the progress, success, and quality of the group’s work.
2. We commit to listening with respect to each other, to recognizing the legitimacy of everyone’s concerns and feelings about topic(s), to asking questions for clarification, and to making statements that attempt to educate or explain. We commit to no personal attacks directed at individuals and/or organizations.
3. Each of us takes responsibility for getting our individual needs met, and we also agree that all relevant issues identified by any member must be addressed by the group. Participants are encouraged to be proactive in bringing forward issues for discussion.
4. Participants commit to giving the same priority to solving the problems of others as they would to their own problems.
5. Participants will recognize a lack of information when it exists, and seek to address “unknowns” through further information gathering or adaptive management.
6. A *consensus* decision making process will be used. We define consensus as a decision that allows every member to say, “I can live with the decision and accept it, even though it may or may not be exactly what I want.” *Consensus* will be attempted and participants hereby commit to working diligently to achieve it.  
  
If it is not possible to achieve *consensus*, then based on listening to all of the ideas and concerns of each participant, we agree to document the dissenting opinion(s) in the meeting minutes along with the name of the person(s) who disagrees. We will then move on to the next issue. We may occasionally postpone making a decision on an issue, deferring the consensus decision making process, until a future meeting so that new information may be brought forward.
7. Final decisions made must be ultimately acceptable to all landowners. These parties, after all, are the individuals or entities owning the land on which the practices under discussion will be implemented.
8. Attendance at each meeting is expected. Members who miss more than two unexcused consecutive meetings, or three meetings in a

year, may have their participation rights revoked. Members are encouraged to send an alternative representative if they are unable to attend a meeting. These alternate members are expected to be pre-briefed on the issues under consideration.

9. It is the responsibility of each member to inform those they represent about issues, progress, and decisions so that these organizations stay well-informed on developments in this collaborative process.
10. Members are expected to carry out assignments on schedule.
11. We agree that interested observers can attend meetings. However, only written input from non-participants will be accepted and considered by the group.
12. Members are expected to respect and support the integrity of this collaborative process outside the meeting room. No participant will attribute suggestions, comments, or ideas of another participant to the news media or non-participants. Members speaking as individuals must specify this when speaking to the media.

Participants agree that all official communications representing this collaborative process with the news media will be the responsibility of \_\_\_\_\_ (or their successors), unless other arrangements are specifically made.

13. If these ground rules are not being met by the participant, the group reserves the right to request a replacement member from a specific organization. It is the responsibility of that organization to bring this new person up-to-speed on this collaborative process.
14. If you hear a rumor, call the facilitator before acting on it.
15. Anyone may leave this process, but will tell the entire planning group why, if withdrawal is due to a group problem. The group will then see if the problem(s) can be addressed to everyone's satisfaction.

### Periodic CRM Plan Review

#### Points to consider at the CRM Plan Review Meeting:

- Review the plan.
- Assess progress.
- Recognize the accomplishments.
- Discuss planned activities that are not complete.
- Analyze any problems or issues.
- Discuss new developments and how they relate to the plan.
- Review monitoring results.
- Consider adaptive management strategies.
- List what is to be done next, who will do it, and when it will be completed.
- Adjust schedule to complete planned elements.

# **APPENDIX B**

## **COORDINATED RESOURCE MANAGEMENT SAMPLE FORMS**

## Resource Consideration Checklist

### LAND USE

- Grazing
- Cropland
- Wildlife
- Weeds issues
- Forest land management
- Fire prevention/prescription
- Historical, cultural, or archaeological resources
- Ag land conversion
- Mining

### WATERSHED

- Erosion control
- Water quality
- Animal waste treatment
- Riparian zone protection/enhancement
- Pollution
- Temperature
- Sediments
- Optimum flow maintenance
- Optimum level maintenance
- Upland cover and management

### RECREATION

- Vacation cabins, farms, and home sites
- Campgrounds and facilities

- Fishing waters
- Animal waste treatment
- Riparian zone protection/enhancement
- Hunting areas
- Off-road vehicle use
- Water sports areas
- Winter sports areas
- Roads and trails
- Parking and other major recreation user-access points
- Litter pick-up and disposal

### THREATENED AND ENDANGERED SPECIES AND HABITATS

- Plants and plant communities
- Animals, fish and their communities or populations
- Reptiles and amphibians

### WILDLIFE

- Waterfowl, shore and wading birds
- Big Game
- Upland species
- Diversity of species
- Fish

### OTHER

## Checklist of Planning Resources

Indicate where each resource is available, who will obtain it, and how it will be used or why it is needed.

Land Ownership Map \_\_\_\_\_

\_\_\_\_\_

GIS Databases \_\_\_\_\_

\_\_\_\_\_

Land Use Designations \_\_\_\_\_

\_\_\_\_\_

Soil Survey \_\_\_\_\_

\_\_\_\_\_

Wildlife Population & Habitat Survey \_\_\_\_\_

\_\_\_\_\_

Fishery Survey \_\_\_\_\_

\_\_\_\_\_

Stream Survey \_\_\_\_\_

\_\_\_\_\_

Timber Inventory \_\_\_\_\_

\_\_\_\_\_

Livestock Inventory or Grazing Plan \_\_\_\_\_

\_\_\_\_\_

Economic Considerations \_\_\_\_\_

\_\_\_\_\_

Watershed Feature Inventory \_\_\_\_\_

\_\_\_\_\_





## Proposed Actions Worksheet

Fill out one sheet for each objective on Form 4.

### Management Objective

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### Actions Proposed To Achieve This Objective:

1. \_\_\_\_\_

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2. \_\_\_\_\_

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3. \_\_\_\_\_

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---

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4. \_\_\_\_\_

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## Action Worksheet

Use one for each action on Form 5.

ACTION \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

### Who Needs To Do What, When?

Make sure those who commit to specific actions are really willing and able to carry them out within the framework indicated.

Who	What	When	How Long
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

**Benefits:** (What will benefit and how? Try to estimate the dollar value of benefits.)

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Costs:** (What will this action cost? Who will pay/or potential funding source?)

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_



# **APPENDIX C**

**2002**

## **MEMORANDUM OF UNDERSTANDING** *(Annotated Version)*

### **Washington State CRM Partners**

USDA Forest Service

USDA Natural Resources Conservation Service

USDI Bureau of Land Management

Washington Association of Conservation Districts

Washington Conservation Commission

Washington Department of Agriculture

Washington Department of Ecology

Washington Department of Fish and Wildlife

Washington Department of Natural Resources

Washington Rangeland Committee

Washington State University Extension

# Memorandum of Understanding For Coordinated Resource Management In Washington State

## PREAMBLE

Coordinated Resource Management (CRM) is a procedure designed to (1) achieve compatibility between the uses being made of our natural resources, which include agriculture, fish and wildlife habitat, forage production and use, forest products, recreation, land development and others; and (2) improve land and water resources and their perpetuation in high quality condition. A Coordinated Resource Management plan covers all ownerships of the planned area. All major uses of the area are considered in an effort to coordinate activities and maximize resource management opportunities.

### I. PURPOSE

This Memorandum of Understanding establishes policy and general guidelines for use by the undersigned state and federal agencies for coordinating their activities in resource planning and working with conservation districts, federal, state and local agencies, and private landowners or users in developing and implementing sound resource management and conservation programs.

### II. POLICY

The signatory parties agree to cooperate, to the extent possible, in preparing and implementing Coordinated Resource Management plans on operating units, allotments, subwatersheds, and other appropriate resource areas made up of private, federal, and state-administered land.

The agencies or organizations cooperating on particular management or planning units will vary depending on the land ownership pattern and resource values within the planning area. The signatory agencies will seek to cooperate with all owners or managers of land and resources within each specific area. Other agencies, organizations, and individual interests will be involved as needed and appropriate.

### III. AUTHORITY

Authority for participation in this effort is covered by existing federal or state statutes or delegations of authority. Authority for federal agencies is also continued in a national Memorandum of Understanding between the USDA Forest Service, Bureau of Land Management, Cooperative Extension Service (formerly Science and Education Administration - Extension) and Natural Resources Conservation Service (formerly Soil Conservation Service) dated November 1987.

## IV. RESPONSIBILITY OF AGENCIES AND ORGANIZATION

- A. The **USDI Bureau of Land Management** and the **USDA Forest Service** plan and conduct multiple-use resource management and conservation programs on lands under their jurisdiction. The Forest Service also has an interest in encouraging sound agriculture, forestry, and conservation practices on areas within and adjacent to national forests and grasslands, and to assist the responsible state agency in promoting forest land management practices on private forest lands.
- B. The **USDA Natural Resources Conservation Service** provides technical assistance to conservation district cooperators and participants in United States Department of Agriculture cost-share programs for planning and applying authorized conservation programs on privately controlled lands.
- C. The **Washington State Conservation Commission**, an agency of state government, assists and guides Conservation District supervisors and their organizations, state, and local agencies, and the citizenry to plan and implement resource management systems needed to bring about an improvement in the quality of the resource base, environment, and life itself. Assistance and guidance include providing for technical expertise to individuals and groups and facilitating citizen involvement in community development activities and concerns to assure accelerated progress in the protection of the resource base and improvement of the quality of our environment and life.
- D. The **Washington Department of Natural Resources** manages state-owned trust lands so as to generate revenue in perpetuity for the specific trust beneficiaries designated at statehood. The department manages trust lands to assure full and continual economic productivity, protect ecological and social values, and provide multiple uses.
- E. The **Washington Department of Fish and Wildlife** develops and implements management programs, statewide, designed to protect, restore and enhance fish and wildlife and their habitats, while providing sustainable fish and wildlife-related recreational and commercial opportunities. All land or resource management programs, particularly on Department of Wildlife-owned and controlled lands, are centered on these objectives.
- F. **WSU Extension** has the responsibility for and provides leadership in all general educational programs of the U. S. Department of Agriculture. Administra-

tive and technical personnel serve as liaisons between departmental research and action agencies and the administrative and extension technical staffs at land-grant universities. County extension agents, located in nearly all counties, make the results of research conducted by the U. S. Department of Agriculture, land-grant institutions, and other research agencies, available to farmers, homemakers, youth, and others.

- G. The **Washington Rangeland Committee** coordinates with rangeland development committees of the western United States; provides statewide leadership and coordination for rangeland classification, inventory, management and improvement; identifies and evaluates major problems and opportunities for range use and management; promotes educational programs; and identifies and sponsors rangeland research.
- H. The **Washington Association of Conservation Districts** represents the Conservation Districts that develop long-range programs; secures and coordinates assistance from appropriate agencies and organizations; encourages and enters into cooperative agreements to assist individuals, groups, and units of government in conservation planning and application; provides means for determining local attitudes and objectives; and serves as catalysts to develop and maintain local interests in and support for conservation and development of resources.
- I. The **Washington Department of Agriculture** serves the people of Washington State by supporting the agricultural community and promoting consumer and environmental protection.
- J. The **Washington Department of Ecology** protects, preserves and enhances Washington's environment, and promotes the wise management of our air, land and water for the benefit of current and future generations. The agency's goals are to prevent pollution, clean up pollution, and support sustainable communities and natural resources.

## V. INITIATION, PLANNING AND SCHEDULING GENERAL CONSIDERATIONS

- A. This Memorandum of Understanding does not modify or supersede existing agreements and/or memorandums of understanding except that this agreement revises and supersedes the current Washington State agreement.
- B. The resource management agencies whose lands are included in any planning area will retain responsibility for meeting all requirements of the laws and regulations pertaining to the use and management of the lands under their respective jurisdictions. The agencies and all landowners retain final authority to make management decisions on their land involved in a Coordinated Resource Management plan.

- C. Contacts and follow-up assistance with those cooperating in a plan will normally be made by the agency having primary planning responsibility or will be mutually agreed upon by the local planning group.
- D. When any practices, structures, or projects are to be applied or installed upon lands under the jurisdiction of a public agency, authorization must be obtained from the appropriate agency prior to initiation of the action.
- E. The priorities and management objectives for federal or state-administered lands will be determined through the responsible agency's planning system. However, special consideration normally will be given to resource areas presenting opportunities for Coordinated Resource Management planning.
- F. The Conservation Districts and the signatories of this Memorandum of Understanding are encouraged to communicate with each other to the end that each Conservation District, which has the opportunity to increase conservation effort through Coordinated Resource Management planning, enters into memorandums of understanding with the appropriate agencies.
- G. When requested by the administering agency, the Natural Resources Conservation Service may provide technical assistance on public land intermingled or adjacent to private lands covered by a Coordinated Resource Management plan.
- H. Where state and private foresters managing related lands are involved, the Forest Service will discharge its responsibilities for forestry technical assistance through the Cooperative Agreement with the Washington State Department of Natural Resources.

## VI. INITIATION, PLANNING AND SCHEDULING

- A. **Initiation**—The State Executive Committee members will acquaint field personnel with this Memorandum of Understanding to assure mutual understanding and interpretation.
- B. **Planning**—Individual planning groups will include representatives of landowners and/or managers, resource agencies and other appropriate organizations that are significantly involved in the operating unit, allotment, or resource area. A moderator to lead the planning process should be selected by the local group for each Coordinated Resource Management plan. Where full-time agency participation is not warranted, suitable arrangements for review should be made at the local level so planning can proceed with reasonable assurance that the final plan will be acceptable to all.
- C. **Scheduling**—Coordinated Resource Management planning should be made acceptable to each participant's schedule. This requires a reasonable amount of give-and-take between participants in the selection and assignment of priority.
- D. **Progress Reporting**—The Task Group will annually report progress to the Executive Group.

## VII. COMMITTEES

### A. State Executive Committee

**Regional Forester**—USDA Forest Service

**Chair**—Washington State Conservation Commission

**Commissioner of Public Lands**—Washington State  
Department of Natural Resources

**Director**—Washington Department of Fish and  
Wildlife

**Director**—WSU Extension

**District Manager**—USDI Bureau of Land Manage-  
ment

**State Conservationist**—USDA Natural Resources  
Conservation Service

**Chair**—Washington Rangeland Committee

**President**—Washington Association of Conservation  
Districts

**Director**—Washington Department of Agriculture

**Director**—Washington Department of Ecology

The Executive Committee will direct interagency planning activities in Washington; review progress and problems; facilitate this program by providing for training and scheduling of personnel; establish guidelines for priorities in planning; and otherwise achieve agency cooperation and coordination throughout the state. They will meet at least annually to conduct


these functions. **The chairmanship of this group will rotate annually, normally in the order listed above.** Representatives of other appropriate state and federal agencies or organizations will be invited to participate in the meetings of this group.

- B. **State Task Group**—This group will consist of agency and organization designated representatives. The Task Group may also invite representatives of the public at large or other groups not represented at the executive level to participate in Task Group activities. The group will promote Coordinated Resource Management planning; provide training and guidance to field personnel in planning procedures; and carry out specific assignments of the Executive Committee. The group will meet at least quarterly to conduct the above functions and prepare and submit progress reports to the Executive Committee chair. Normally, the Task Group chair will be the person selected as the agency representative corresponding to the Executive Committee chair.

## VIII. MODIFICATION

This agreement shall remain in effect until modified by the parties in writing, and is renegotiable at the option of any one of the parties.

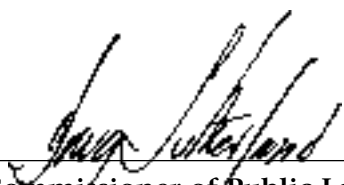
## SIGNATURE PAGE

  
\_\_\_\_\_  
Regional Forester  
USDA Forest Service

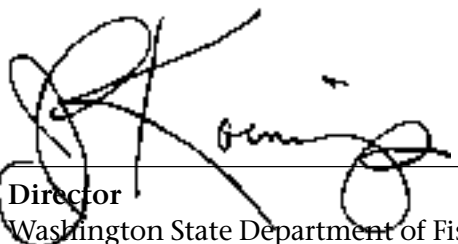
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Date

  
\_\_\_\_\_  
Chair  
Washington State Conservation Commission

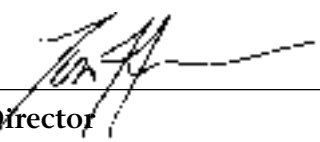
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Date

  
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Commissioner of Public Lands  
Washington State Department of Natural Resources

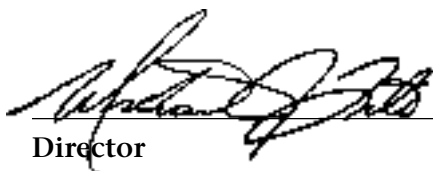
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Date

  
\_\_\_\_\_  
Director  
Washington State Department of Fish and Wildlife

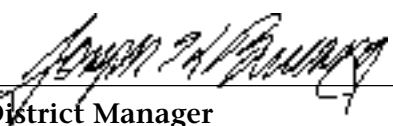
7/2/02  
Date

  
\_\_\_\_\_  
Director  
Washington State Department of Ecology


5/29/02  
Date

  
\_\_\_\_\_  
Director  
Extension

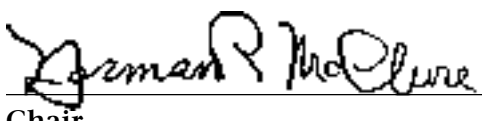
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\_\_\_\_\_  
District Manager  
USDI Bureau of Land Management

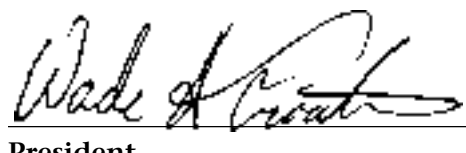
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State Conservationist  
USDA Natural Resources Conservation Service

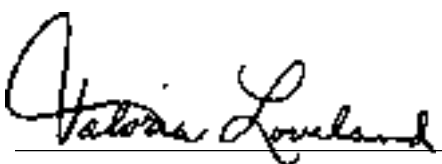
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Chair  
Washington Rangeland Committee

2/22/02  
Date

  
\_\_\_\_\_  
President  
Washington Association of Conservation Districts

4/4/02  
Date

  
\_\_\_\_\_  
Director  
Washington State Department of Agriculture

8/23/02  
Date



College of Agricultural, Human, and Natural Resource Sciences

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