Washington State
Coordinated Resource Management

HANDBOOK
7TH Edition, 2019

Partnerships for Stewardship

Washington CRM Task Group

Washington State Coordinated Resource Management Program

> *"Empowering local people to work together to resolve natural resource problems and coordinate their activities across the landscape and jurisdictional boundaries."*

PURPOSE OF THIS HANDBOOK

This handbook is a guide to assist the reader in utilizing Coordinated Resource Management. 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, ask for help with the process from the CRM program or other outside sources.

WASHINGTON CRM PROGRAM VISION

Coordinated Resource Management (CRM) provides long-term local solutions to intractable issues through broad stakeholder involvement and growing relationships of trust.

WASHINGTON CRM PROGRAM MISSION

CRM seeks to create stronger communities capable of successfully managing resource conflicts – today and into the future – through local collaborative processes which bring together all interested private and agency stakeholders. Through the development and implementation of solutions, in an environment facilitated to foster trust and relationship, communities develop the ability to deal with issues in a manner sustainable into the future. The CRM Task group provides support and training for those who facilitate and participate in these processes.

Washington CRM Program assistance includes . . .

- Helping you decide whether Coordinated Resource Management will help address your concerns.
- Identifying stakeholders, partners, and the resource assistance needed for your project.
- Outlining the logistical elements necessary for launching a successful CRM process.
- Locating a skilled facilitator, if needed.
- Helping you find funding sources and in-kind resources for your identified projects.
- Locating CRM practitioners willing to share their experiences, advice, and successes.
- Mentoring key players in your CRM group.
- Troubleshooting specific problem areas and contentious issues that may arise.
- Providing training opportunities in facilitation, problem solving processes, and grant writing.

We encourage you to contact us with your questions about implementing Coordinated Resource Management and similar collaborative group processes:

Website: **https://scc.wa.gov/crm/** E-mail: **info@crmwashington.org**

Washington State Coordinated Resource Management HANDBOOK

Coordinated Resource Management (CRM): *"A voluntary and collaborative problem-solving process for resource management issues"* (Society for Range Management)

INTRODUCTION

Coordinated Resource Management (CRM) group processes can be used to bring people together, improve communications, find solutions to problems, and reduce conflicts about the management of natural resources. The 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.

The basic concept underlying CRM is that coordinating management, planning, and implementation of field activities across ownership or management boundaries results in improved resource condition, assists local people in meeting their objectives, and minimizes conflict among land users, managers, and owners. By using this CRM approach, resource problems can be addressed and solved effectively with unusually strong support. This happens because local stakeholders share ideas, decisions are made by consensus, and group efforts and resources are applied to projects in a specific geographic area. While taking part in a CRM group, 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 on, work, and use a given piece of land are the people most capable of developing and implementing sound plans for its use. Experience has shown that people with diverse viewpoints that voluntarily meet as a planning team will find common ground as they interact with one another and 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 of CRM is constructive natural resources problem-solving through cooperative planning and management.

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 users of any and all natural resources. 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 rightfully thought of as a way to resolve conflicts over land use, it is equally effective in improving communications and coordinating management activities among stakeholders with diverse interests even when there is no conflict.

CRM has four **cornerstones**: it is voluntary, locally-led, landowner-initiated, and inclusive.

CRM uses **consensus** based decision-making processes. 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 not be exactly what I want." CRM 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. Consensus decisions result in a successful CRM plan that will be strongly supported by every member of the planning group and local community.

The 10 CRM Steps

1. **Recognize the opportunity for a CRM problem solving approach and get organized.**

2. **Conduct the first meeting. Invite area land owners, resource managers, and other stakeholders to participate.**

3. **Define the geographic boundaries of the planning area.**

4. **Consider multiple resource issues and collect existing data. Inventory, assess, and evaluate all natural resources including soil, water, plant and animal.**

5. **Identify objectives and concerns—giving consideration to all resources and participants.**

6. **Develop action and funding plans to achieve both individual and group objectives.**

7. **Create and re-evaluate the CRM plan 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 through active field projects. Coordinate management activities.**

10. **Annually review monitoring data, progress, and new issues or opportunities. Modify plan as needed. Coordinate upcoming activities and management.**

Even though you may not follow the same sequential order, using these CRM steps will result in a plan that provides the following:

- A description of the area involved, including land ownership, resources and features
- A list of land and resource management objectives that all parties have contributed and agreed to
- A list of management activities or actions that will achieve each objective
- The location of each project or practice
- A schedule of activities and projects to be implemented
- A commitment to accomplish each activity from the responsible individual(s)
- A means for monitoring conditions, evaluating progress, and providing adaptive management

Each local CRM group is independent and will address a unique set of problems, opportunities, resource situations and participant objectives. Using this collaborative process and the resulting plan, 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 COORDINATED RESOURCE MANAGEMENT

Step 1: Recognize the opportunity for a CRM problem solving approach and get organized.

The Opportunity: The CRM process usually begins when someone recognizes the need to address resource management issues. The process can be initiated by an individual, group, private landowner, organization, or agency. Contact the CRM Program (see inside front cover), the local Conservation District office, or one of the other Washington State CRM Partners (see next page) for help organizing a CRM group.

Stakeholders: Identify all individuals, interest groups, and agencies that could potentially be affected by or might be interested in natural resource improvements or discussion of the issues. Include all landowners and managers within the planning area, along with local representatives of all governmental natural resource entities. Ideally, those present should have decision-making authority for the group or agency that they represent. Whenever members cannot attend a meeting, they should be expected to send alternates that have been briefed on group process, progress, and issues.

In addition, people with expertise in the particular natural resources to be considered may be wise additions to the group. 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 or withdraw.

Through a statewide *Memorandum of Understanding* (Appendix C), twelve public and private entities have agreed to cooperate in Coordinated Resource Management activities throughout Washington State. The CRM Program may be able to help engage parties affiliated with the entities listed below in collaborative efforts throughout Washington.

Washington State 2015 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 State University Extension

Step 2: Conduct the first meeting. Invite area land owners, resource managers, and other stakeholders 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 general 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 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 News Release in Appendix A) to the local media, distribute fliers or post them in public facilities and on bulletin boards.

Logistics and Agenda: Typically at the first meeting, someone with experience in facilitating group planning and neutral ties to the expected issues can provide leadership, but the group should then select a chair and/or 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
- Conduct a round-robin of self-introductions during which participants briefly summarize their organization, responsibility and particular interests
- Ask for group approval and input on adjustments to the agenda

- Summarize the CRM process to be used and describe the results and outcomes that can be anticipated
- Get group input on the proposed planning area boundary using a map
- 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: Did this meeting/Will this process accomplish your expectations? What did we miss? Who should be here that is not?
- Set the date, agenda, and purpose for the next meeting and define what is to be accomplished by whom prior to that meeting

See Sample Document B (Appendix A) 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 essential to lead your process. Attributes of a good facilitator include professional competence 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 someone local who will remain impartial when facilitating the meetings.

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 so that members will contribute their thoughts and ideas**
- **Helps group members focus on solutions, not personal or organizational agendas**
- **Gets agreement through consensus on desired outcomes**
- **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**
- **Makes sure no personal attacks occur**
- **Remains neutral**
- **Does not contribute content ideas or evaluate ideas of group or its members**
- **Knows when and how to get others to perform the facilitating and recording functions**
- **Balances process and content focus**

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. If possible, have the group suggest ground rules. Sample Document D (Appendix A) provides Sample Ground Rules for Collaborative Group Processes.

Avoiding Gridlock: The facilitator should maintain the momentum of the decision-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—call a short break
- Set issues aside temporarily
- Assign a subcommittee or two to work on the issue, and report back
- Hold a field tour so everyone can look at an area and discuss its features at the same time
- Bring in a speaker with specific expertise in the ecological or economical bottom line issue
- Separate the people or position from the problem or need

In addition, problems may develop that are highly technical, need extensive research, or are beyond the 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 or Technical Review Team to gather facts and propose alternatives for consideration by the entire group.

Here are some tips to help the meeting go well:

1. ***Start on time***, no matter what. If you can do something in the beginning that late-comers 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 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, being 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 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 umbrella 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. Time limitations may not allow committee members, especially agencies, to participate in too many small planning groups.

Step 4: Consider multiple resource issues and collect existing data. Inventory, assess, and evaluate all natural resources including soil, water, plant and animal.

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. Find out how CRM may relate to, replace or modify other planning efforts. 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
- Drainage District
- Noxious Weed Control Board
- Public Utility District
- NGOs – environmental, sportsmen, commodity, other special interest groups
- Other

Collect Data: Determine what data may be needed by the group. 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 (see Appendix B) 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.

In many cases, there may not be any data available or there may be critical gaps in the data. There will probably be a need to inventory, assess and evaluate several aspects of the natural resources. For example, you may need to use Proper Functioning Condition (PFC) or another method to assess riparian area conditions. Or, if the data you have is old, you will probably need an updated assessment of **current** conditions. Thought should be given to what baseline data is needed to develop objectives and for any monitoring that will be done to measure project success (see Step 8).

Step 5: Identify objectives and concerns—giving consideration to all resources and all participants.

Identifying Problems, Issues, and Objectives: Though initial perceptions of problems, issues, and objectives often make up a major portion of the first meeting or two, it should be noted that a natural resources assessment and evaluation (Step 4) is typically needed before it is possible to do a complete job with Step 5.

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 an Issues and Concerns List (see Form 3, Appendix B) 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). Keep the SMART acronym in mind – write objectives that are Specific, Measurable, Achievable, Realistic, and Time-limited. 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 more than one meeting. 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.

In cases where the objectives and concerns are too numerous to deal with efficiently, it may be advantageous to consolidate or prioritize items on the lists. Facilitators or the CRM Program can suggest ways to do this.

Step 6: Develop action and funding plans to achieve both individual and group 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 that 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, even if far-fetched, 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 procedure may take a long time and a lot of discussion. Some of the work 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 before all agree on one that will do the job. Do not be concerned if some objectives seem to contradict each other. As people meet and learn one another's concerns and management goals, constructive, innovative solutions will surface to achieve objectives that initially appear contradictory. If not, compromise may be possible.

Preparing the Action Worksheet: Next determine each participant's or combination of participants' 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 take 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 Another Meeting?

No—if you still need to . . .

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

Yes—if you need to . . .

- Communicate critical information to a diverse group
- 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

Step 7: Create and 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 and use, 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 matters 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, Appendix B)

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 annual review sessions.

You may want to consult experts to help devise appropriate ways to monitor the results of your work. Regardless of who devises or carries out the monitoring, you will want to ensure that the methods chosen are as simple, convenient, repeatable, and consistent as possible. Include how monitoring will occur, by whom, and when, in your plan.

Some general questions to consider when designing a monitoring system:

- Which are the most meaningful parameters or variables to monitor? You likely do not have enough funds, people, or time to monitor everything you would like to.
- What information can you find out through other means or sources? (Such as baseline data, for instance.)
- Will you be able to track both short-term and long-term changes in order to manage annual activities and establish trends?
- Are there seasonal or unusual events or off-site factors to take into account?
- Where are the typical, critical, or key areas that need to be monitored? Are they accessible and convenient?

Step 9: Implement the plan through active field projects. Coordinate management activities.

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

Share Success: Consider sending news releases to the local media highlighting your achievements to keep the community aware of progress. For consistency, some groups assign one member to be the official spokesperson. 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, progress, and new issues or opportunities. Modify plan as needed. Coordinate upcoming activities and management.

Periodic review sessions, e.g. annually, should bring plan participants back together to reexamine problems and objectives and to recognize progress and 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.

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 background material, access to outside resources)?

____ Are basic issues discussed openly, directly, and respectively? Does everyone have the opportunity to express their opinion?

____ 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?

____Has the group agreed upon effective decision making mechanisms?

____Is the interaction oriented toward objective data gathering and problem solving?

____Are conflict and disagreement confronted openly and worked through objectively and fairly?

____Is there adequate opportunity for individual members to meet 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)?

For Further Reading (go online to *www.crmwashington.org* for more resources):

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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 ides 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, defer- ring 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 ____

____

Issues and Concerns List

CRM Form – 4

Management Objectives List

CRM Form – 5

Proposed Actions Worksheet

Fill out one sheet for each objective on Form 4.

Management Objective

____

____

____

Actions Proposed To Achieve This Objective:

1. ____

____

____

____

2. ____

____

____

____

3. ____

____

____

____

4. ____

____

____

____

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?)

____

____

____

____

CRM Form – 7

Final Plan Agreement Signature Page

Date ________________________________

We, the undersigned, have participated in the development of the ______________ ____ Coordinated Resource Management plan, and concur with the decisions contained herein, and will act to implement them, to the best of our ability.

An annual meeting to review this plan by the participants will be scheduled and organized each__________________________by___________________________.
(month) (name)

The purpose of this meeting will be to discuss problems, make revisions in the plan, summarize progress and acknowledge accomplishments, set priorities for implementation of planned items, and outline projects for the coming year.

NAME	REPRESENTING

APPENDIX C

2015
MEMORANDUM OF UNDERSTANDING
(Annotated Version)

Washington State 2015 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 State University Extension

2015 MEMORANDUM OF UNDERSTANDING

Washington State Coordinated Resource Management Partners

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

PREAMBLE

Coordinated Resource Management (CRM) is a consensus-based, collaborative process designed to (1) implement compatible use of our natural resources; including agriculture, fish and wildlife habitat, forage production, forest products, recreation, and land development; and (2) improve and perpetuate our land and water resources in a 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 organizations and agencies, and 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, sub watersheds, 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 organizations and 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, and 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 ORGANIZATIONS

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** helps its customers apply conservation practices and activities to conserve their soil, water, and other natural resources through its cost-share and conservation technical assistance programs.

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 more than 5.6 million acres of state-owned, forest, range, commercial, agricultural, conservation, and aquatic lands. Of these, more than half are held in trust to produce income to support public schools, universities, prisons, and other state institutions. These state trust lands managed by DNR provide other public benefits, including outdoor recreation, habitat for native fish and wildlife, and watersheds for clean water.

E. The **Washington Department of Fish and Wildlife** develops and implements statewide management programs 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 Fish and Wildlife-owned and controlled lands, are centered on these objectives.

F. **Washington State University Extension** is the outreach and applied research enterprise of the land grant university in cooperation with the U.S. Department of Agriculture National Institutes for Food and Agriculture, county government, and Washington State University. Guided by strategic plans and advisory committees we identify issues that the University's research and knowledge bases can address. Extension faculty are located in all 39 counties, at Research and Extension Centers, and at the four campuses of WSU to make the results of research conducted by the U.S. Department of Agriculture, land-grant institutions, and other research agencies, available to farmers, businesses, communities, families and youth, and others to have a positive impact.

G. The **Washington Association of Conservation Districts** presently represents 45 member Conservation Districts across the state. WACO helps guide implementation of long-range programs; provides political access for CD's at the state level, helps CD's communicate with other agencies, helps CD's coordinate their programs and assistance with appropriate agencies and organizations; represents CD interests. When requested, WACO enables cooperative agreements that-assist individuals, groups, and units of government in conservation planning and application. WACO provides a vehicle for presentation of Conservation District local attitudes and objectives to other agencies. WACO serves as a catalyst to develop and maintain local interests in and support for natural resource issue resolution.

H. The **Washington State Department of Agriculture** serves the people of Washington State by supporting the agricultural community and promoting consumer and environmental protection.

I. 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 SCOPE OF AGREEMENT AND ISSUES OF JURISDICTION

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

Director--Washington State Department of Agriculture
Director--WSU Extension
District Manager--USDI Bureau of Land Management
Commissioner of Public Lands-Washington State Department of Natural Resources
Director--Washington Department of Ecology
Regional Forester--USDA Forest Service
State Conservationist-USDA Natural Resources Conservation Service
President-Washington Association of Conservation Districts
Director--Washington Department of Fish and Wildlife
Executive Director-Washington State Conservation Commission

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 chair 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 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.

CRM Memorandum Signature Page

Manager Designee of Managem		issioner of Public ington Department	9/2/2016 date
Director or Designee ington Department	6/16/16 date	for Regional Forester or Des nee USDA	10/26/17 date
State servatio Designee	10/29/17 date	Director or Designee	6/16/2016 date
President of Designee Washington Association	3/8/2018 date	Director Designee	2/4/16 date
Director or Designee	6/21/16 date	Director or Designee	5/17/18 date

WSDA

U.S. DEPARTMENT OF THE INTERIOR
BUREAU OF LAND MANAGEMENT

FOREST SERVICE
U S
DEPARTMENT OF AGRICULTURE

NRCS
Natural Resources Conservation Service
Helping People
Help the Land

Washington State
Conservation Commission

WASHINGTON STATE UNIVERSITY
EXTENSION

DEPARTMENT OF
ECOLOGY
State of Washington

WASHINGTON STATE DEPARTMENT OF
NATURAL RESOURCES

U.S.
FISH & WILDLIFE
SERVICE

Washington Association
of
Conservation Districts

Washington
Department of
FISH and
WILDLIFE