

A Reference Guide to Forest Service Public Engagement in a Virtual Environment

Updated: 4/20/2020

The pandemic has forced us to consider how to conduct our public engagement within a virtual environment. Virtual engagement is not a new frontier for us, but its use as the primary engagement tool (not complemented by in-person meetings, open houses, and/or workshops) is. This document provides general information to help you assess and start to plan your online public engagement.

The [Spectrum of Public Participation](#) provides a framework for thinking about how best to involve stakeholders and the public in Forest Service actions or decisions. The [International Association of Public Participation](#) (IAP2) developed the Spectrum to help agencies clarify the role of the public and stakeholders in any public participation process. An adapted Spectrum is referenced in the Council on Environmental Quality Collaboration in NEPA Handbook and the 2012 Planning Rule Directives. Table 1 explains the adapted Spectrum and the goal at each level of participation.

Table 1. Use the IAP2 spectrum to determine the level of engagement you would like to achieve.

IAP2 Spectrum of Public Participation				
	Inform	Consult	Involve	Collaborate
				
Goal	To provide the public with balanced and objective information to assist them in understanding the problem, alternatives, opportunities, and/or solutions.	To obtain feedback on analysis, issues, alternatives & decisions.	To work directly with the public throughout the process to ensure that concerns and aspirations are consistently understood & considered.	To partner with each aspect of the decision-making including the development of alternatives and the identification of the preferred solution.

Our connection to and engagement with communities of place and interest is foundational to our work. The current max-telework and stay-at-home orders we are all currently under provide a unique opportunity to consider our options, test those options and strategically frame how we utilize online engagement under normal circumstances (e.g., when stakeholders and the public are unable to attend in-person events because of distance, location or other time/personal constraints).

To help you design the best options for your public engagement work:

Step 1: Consider your needed level of engagement. Reference Table 1 and consider the purpose of your engagement and your desired outcomes: Who are you trying to reach? How much time are you prepared to invest? What do you hope to gain from this engagement?

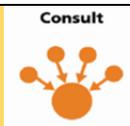
Step 2: Identify the appropriate platform for engagement. Once you have identified your level of engagement (Table 1), identify an appropriate platform or combination of platforms to meet your engagement goals (Table 2). Be sure to consider how these platforms may work together to create a larger communication and engagement network. It is important to acknowledge that the online platforms for public participation are not available to all members of the public. Broad-band connectivity, availability, affordability, and digital literacies all affect public accessibility.

NOTE: This document is designed to be a living document and will be reviewed, updated, and available on the EMC [Public Engagement SharePoint](#) site. Please send comments, corrections, and questions to Sharon Timko at sharon.timko@usda.gov

Table 2. USFS online platforms to meet public engagement goals and outcomes.

		
Sharing Information with Stakeholders & the Public		
Online Platform	Pros	Cons/Special Considerations
Websites	<ul style="list-style-type: none"> • Capable of reaching very large numbers of people with large amounts of information, including documents and decisions. • Makes information accessible anywhere at any time for broad audiences and invites people to become involved if interested. • Provides links to go deeper with additional information. 	<ul style="list-style-type: none"> • Websites must be maintained to keep information current. • Large files or graphics can take a long time to download, if at all. Upload content in the smallest file size as possible. • Information overload and poor design can prevent people from finding what they need.
Mailing Lists (GovDelivery)	<ul style="list-style-type: none"> • To share information electronically via short message (email), including notifying stakeholders and public when new material is posted to a Website, inviting them to upcoming meetings, sharing summaries of meetings, etc. • With GovDelivery, a member of the public can self-subscribe and unsubscribe to receive messages regarding topics or geographic areas of interest (e.g., recreation projects, districts, forests, etc.). • GovDelivery is accessible through the Planning, Administrative Review, and Litigation System (PALS) and can be used to create a mailing list or provide updates on projects or comment periods. 	<ul style="list-style-type: none"> • Can overload people with too much information if not organized in a succinct and effective way. • Messages may go to people’s junk mail, so you cannot assume everyone received the information • A good idea is to also post important information or upcoming events to the appropriate website.
Social Media <ul style="list-style-type: none"> • Instagram@u.s.forestservice • Facebook @USForestService • Twitter @forestservice 	<ul style="list-style-type: none"> • Provides for quick and efficient sharing of information with a wide range of people. • Can be used to keep public knowledge current and raise awareness of upcoming events. • Can be used to explore existing networks of people interested in a topic. • Approach and platform can be shaped by your purpose/objective and targeted towards the people you want to engage. 	<ul style="list-style-type: none"> • Need to be familiar with rules and guidance for creating social media accounts, posting content, and moderating discussions. (FSM 1660). • Office of Communications reviews all requests for establishing new social media accounts or pages. • Facebook live video streams and Twitter video posts currently do not easily meet 508-compliance requirements. • You should ensure your content and photographs are high quality and shareable. • You should ensure you have a photo release form on file before posting photos of people. • Responding to questions and comments and moderating discussion or comments can be time intensive.
MS Teams Meeting (FS Decision Guide)	<p><i>We are learning this new agency platform; these bullets may not capture all the emerging features.</i></p> <ul style="list-style-type: none"> • For sharing information with stakeholders and the public via video conferencing and virtual meetings. • Capacity: 250 persons max, schedule any time. Depending on the purpose and need of the event, the size can be managed by invitation-only and a no forwarding option in Outlook. • For public meetings, the meeting invite can be forwarded by anyone and the URL can also be shared. • All attendees can see the questions asked and answered in the chat box. • Audio is 2-way. Attendees can unmute to ask questions and/or provide comments. 	<p><i>We are learning this new agency platform; these bullets may not capture all the emerging features.</i></p> <ul style="list-style-type: none"> • Works best with a modern browser, such as Chrome, Firefox, or Edge. • Limited features for meeting facilitation, No options for hand raising. Only chat is available. Cannot see attendee list and chat at the same time. Difficult to save the chat shared during the event. (Raise hand feature & background options are coming, according to Microsoft) • If the meeting organizer doesn’t have the audio pilot (phone integrated), attendees need to have a computer with microphone, speakers (or headset) to access the meeting or webinar audio. • Meeting space cannot be set up days in advance. • No broadcast only mode. All attendees can be muted but all participants can unmute themselves.

	<ul style="list-style-type: none"> • In the meeting options (under the link in the invite), presenters can be set to limit those who can control the settings and share screens. See roles. • Can be recorded. Once the record button is pushed, the recording is posted to Streams; the recording is available as a link. The link can be embedded into websites. The recordings do not expire. 	<p>If necessary, an attendee can be removed from a meeting.</p> <ul style="list-style-type: none"> • No control of attendees' webcams. If something inappropriate is shown, the attendee can be removed from the meeting. • No closed captioning available. • To avoid disruption during presentations, there is a meeting option for "Everyone" to "Bypass the Lobby" at the bottom of the Teams Meeting link in your Outlook invitation. • Platform is currently being tested (within USFS) for meeting access via mobile phones.
<p style="text-align: center;">MS Teams Live Events (FS Decision Guide)</p>	<ul style="list-style-type: none"> • Good for one-way sharing of information for public events particularly where high turnout is expected and/or unknown and audio through the computer is acceptable. • Capacity: 10,000 attendees; schedule anytime. • The organizer is a producer and can identify and manage all presenters. Presenters can stream webcams and screen share. • Attendees can ask questions via Q&A feature. • Closed caption default setting. • Records automatically. The recording is a file available for download (180 days) and can be shared via link for the attendees. • Downloaded recording file can be uploaded and saved to Stream; remains available unless deleted by the owner. 	<ul style="list-style-type: none"> • Citizens need to have a computer with speakers; no access via phone line. • 20-40 second delay from when the presenter speaks to when the attendees will see/ hear. • Audio is one way (attendees are listen-only). • There is no chat, but a Q&A feature allows participants to submit questions (they will not see questions/comments submitted by others unless they are "published" or replied to all). • Requires a dedicated Q&A moderator.
<p style="text-align: center;">WebEx Personal Room (FS Decision Guide)</p>	<ul style="list-style-type: none"> • Best for sharing information in groups less than 200. • Facilitation features include: chat, ability to mute all participants, polling options, and white board. • Presenters can share screen and files. • Once you secure a WebEx personal room, no advance scheduling is needed • Can alternate hosts. • Can access via mobile devices. • Can restrict access to a meeting. • Can be configured for closed captioning. • Can record (records expire after 1 year). 	<ul style="list-style-type: none"> • Not good for high-interest open public events, where turnout is unknown. • A request for a Personal Room can take 5-10 business days to process, but can take up to <u>8 weeks</u> to complete. • Users should plan on using their Personal Room for at least a year. • No audio or VOIP. Meeting hosts need to include an AT&T conference line. • No multiple hosts or multiple presenters option but can alternate hosts and presenters. • Forest Service has a limited WebEx version. Not all functions and features are available. • Meeting space cannot be set up days in advance (has to be configured when you start the session). • Schedule for closed caption feature.
<p style="text-align: center;">Adobe Connect (FS Decision Guide)</p>	<ul style="list-style-type: none"> • A familiar webinar platform for stakeholders and the public. • Capacity: 100, 500, or 1,000 people (depending on license type used); 500- and 1,000-seat sessions must be scheduled in advance. • Facilitation features such as chat, Q&A, note pod (virtual flip chart), white board, raise hand are available to help manage the presentation and questions. • Host can mute all attendees. • Can have multiple hosts and presenters (great for back-up and supporting the event). Presenter area serves as "back-stage." • Meeting rooms and configuration settings are saved until deleted. Allows you to set up multiple layouts days in advance for easier hosting. • Can use computer-based audio and/or ATT phone line • Most accessible platform available (508 compliant). 	<ul style="list-style-type: none"> • Only two Shared Seminar licenses (a 1000-seat and a 500-seat) for USFS. • Scheduling may be challenging. Need to schedule well in advance. First come, first served basis. • The website states: Given the limited availability of seminar capacity, employees should only use Adobe Connect when absolutely required. • Narrow window of availability of larger room in the middle of the day to be inclusive of stakeholders and the public in all time zones. • There are 150 individual licenses (100-seat room) in the agency that don't require scheduling. These individual licenses will expire February 2021. • Schedule for closed captioning feature.

	<ul style="list-style-type: none"> • Captions can be integrated and allow user to adjust font size and color contrast. • Dynamic and accessible recordings that don't expire (links, file download, captions, screen-reader access available in recordings). 	
ESRI Story Map	<ul style="list-style-type: none"> • A good way to communicate with maps, videos, and photos about projects or ongoing activities on the forest. • Many templates available to create interesting stories. • Can connect to Talking Points Collaborative Mapping (below) for comment integration. • Accessible online through computer or mobile device. 	<ul style="list-style-type: none"> • May require expertise of a GIS specialist in order to load data layers or design maps. • Office of Communication review needed.
Consulting and Involving Stakeholders & the Public		 
Online Platform	Pros	Cons/ Special Considerations
Websites	<ul style="list-style-type: none"> • Website can be designed to allow for public comments. 	<ul style="list-style-type: none"> • Project websites are automatically created by information entered in PALS and should be linked to CARA (see below) to receive comments and provide a consistent commenting mechanism across the agency.
Comment Analysis & Response Application (CARA)	<ul style="list-style-type: none"> • CARA is the corporate platform for receiving public comments associated with NEPA and objections. • Best used for consulting with stakeholders and the public on programmatic and project level decisions. • Provides for a transparent process of receiving and cataloging public comments. Stakeholders and the public are able to view the comments received in the public reading room. • Facilitates the sharing of information with stakeholders and the public. • Sorts forms automatically. 	<ul style="list-style-type: none"> • Information exchange is one way.
Surveys or polls	<ul style="list-style-type: none"> • When properly constructed using good sampling techniques, surveys can reach a broad, representative public or target group. • If repeated it can become a useful form of social monitoring, especially concerning social sustainability, desired conditions, suitability matters. 	<ul style="list-style-type: none"> • Surveys can be conducted with 9 or less individuals without the Office of Management & Budget (OMB) approval • OMB approval is required for surveys conducted with 10 or more individuals. It can be a labor and time intensive, process and a lengthy process. • Need to adhere to the Paperwork Reduction Act Guide. • Without OMB approval federal funds cannot be used to contract the survey out to others to implement. • Information flow is generally 1-way. Requires report writing or summary posting for transparency.
MS Teams Meetings (FS Decision Guide)	<ul style="list-style-type: none"> • There is a lot of potential here for receiving stakeholder and public input and/or providing agency feedback. • Meeting size can be managed through invitation-only and a no forwarding Outlook option. • All participants can share information and share screens. • These meetings are open and available for 60 days past the scheduled meeting so you can re-use the same link and chats/documents if desired. 	<ul style="list-style-type: none"> • See meeting facilitation limitations in this column under <i>Sharing Information</i>.

WebEx Personal Room (FS Decision Guide)	<ul style="list-style-type: none"> • Once you secure a WebEx personal room, no advance scheduling is needed • Meeting capacity 200 • Facilitation features such as chat box, ability to mute all participants, polling, and white board. • Presenters can share screen and files. • Can be configured for closed captioning. 	<ul style="list-style-type: none"> • See scheduling processes in this column under <i>Sharing Information</i>.
 Collaborating with Stakeholders and the Public		
Online Platform	Pros	Cons/Special Considerations
Adobe Connect (FS Decision Guide)	<ul style="list-style-type: none"> • Tool for facilitating meetings, getting input, brainstorming ideas, and coming to agreement around priorities. • Only platform with a breakout room option, allowing you to divide large numbers of participants into smaller discussion groups. • Facilitation features: chat, notes pod (virtual flip chart), polls, white board, and raise hand. These features are also available in small group discussions. • Easy to save notes pod, poll responses, whiteboard, and chat transcript to process for follow-up to the meeting, analyze input, etc. • Dynamic and accessible recordings that don't expire (links, file download, captions, screen-reader access available in recordings). 	<ul style="list-style-type: none"> • Breakout rooms can be used in meetings or training sessions that have 200 or fewer people. Hosts can create up to 20 breakout rooms for a single meeting or training. • Uses meeting audio (computer microphone and speaker) for breakout rooms. • If using or supplementing with AT&T phone line, those attendees who join the audio through the phone line will not have audio in the breakout rooms. • See major scheduling limitation in this column under <i>Sharing Information</i>.
Talking Points Collaborative Mapping Tool (TPCM)	<ul style="list-style-type: none"> • Best used for spatial referencing public comments. • Place is important and many people like to work with maps. • Unique spatial and learning capabilities for receiving, analyzing, reporting and integrating public comments and photos. • Public commenters can communicate with each other, as well as Forest Service staff. • Can integrate with ESRI Story Maps, which may be useful for project development and comment. • Accessible from mobile devices. 	<ul style="list-style-type: none"> • Regional or Forest GIS personnel implement a TPCM project using an ArcGIS Pro task workflow with an accompanying application configuration guide. • Office hours are available with the TPCM Enterprise Program team to answer questions. • Incidental support can be found at the TPCM Help Desk. • If GIS personnel are in short supply or additional assistance is needed, an agreement can be made with the Enterprise Program to provide the necessary level of support. • Consider staff time needed. Forests are responsible for monitoring site comments and operations.
WebEx (FS Decision Guide)	<ul style="list-style-type: none"> • This works best for smaller invitation-only stakeholder collaborative meetings because there is no breakout room function. • Stakeholders and the public can share files and screens and view attendees. • Recording option (records expire after 1 year) 	<ul style="list-style-type: none"> • No capacity to break a large group into smaller discussion groups. • See scheduling processes in this column under <i>Sharing Information</i>.
MS Teams Meetings (FS Decision Guide)	<ul style="list-style-type: none"> • Best for smaller invitation-only stakeholder collaborative meetings because there is no breakout room function and limited facilitation features. • Stakeholders and the public can share files and screens and view attendees. • Multiple people can work on a document at the same time. • Recording option. 	<ul style="list-style-type: none"> • No capacity to break a large group into smaller discussion groups. • See meeting facilitation considerations in this column under <i>Sharing Information</i>.

NOTE: Skype is available through the end of the calendar year and then it will be replaced by Teams. For that reason, it is not included in table.

See next page for help contacts and additional resources.

Need Help?

- Chief Information Office Online Support, Collaboration Group at SM.FS.fs-ct@usda.gov. They can help with MS Teams, MS Teams Live Events, Adobe Connect, and WebEx. Multiple people monitor this inbox.
- Office of Communications, Corporate and Digital Engagement, Social Media, and Web Site Support – Mason Lowery at 202-205-6206 or mason.lowery@usda.gov
- Talking Points Collaborative Mapping: Cass Klee at cassandra.klee@usda.gov or 907-828-3228.
- GovDelivery and CARA support at [emnepa help desk](#)

Check Out These Resources

1. [IAP2 COVID-19 Public Participation Resources](#)
2. [IAP2 Digital Engagement, Social Media & Public Participation](#)
The Forest Service is an IAP2 member. Learn about the benefits and [register](#) to receive your free individual login.
3. [Broadening Public Participation Using Online Engagement Tools](#)
4. [A Local Official's Guide to Online Public Engagement](#)
5. [The Engagement Toolkit](#)