



## Outreach Plan for the Pacific Halibut Management Strategy Evaluation

**Prepared for**

International Pacific Halibut Commission

**Prepared by**

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## Contents

1	Introduction.....	1
2	Outreach Objectives.....	1
3	Target Audience for Outreach.....	2
4	Outreach Topic Matter.....	2
4.1	Topic Matter for Informing Stakeholders.....	2
4.2	Topic Matter of Input to be Gathered.....	3
4.3	Topic Matter to Excite Stakeholders.....	3
5	Outreach Tools.....	3
5.1	Overview of Outreach Tools.....	3
5.2	Email Updates.....	4
5.3	In-Person Interaction.....	5
5.4	Stakeholder Surveys and Structured Feedback.....	5
5.5	Presentation Support.....	5
5.6	MSAB Website.....	5
5.7	MSAB Meeting Summary.....	6
5.8	Terms of Reference.....	6
5.9	Manual for the IPHC MSE Tool.....	7
5.10	MSAB Open-houses.....	7
5.11	Allow Observers at MSAB Meetings.....	8
5.12	Brochures.....	8
5.13	Social Media.....	8
6	Outreach Implementation.....	8
	Appendix A: Summary of Outreach Interviews.....	10
	Appendix B: Types of Public Participation.....	11

**Tables**

Table 1. Outreach tools by audience and objectives that each tool can address.....	4
Table 2. Outreach activities consistent with moderate incremental outreach effort. ....	8
Table 3. The public participation spectrum of the International Association for Public Participation. <sup>1</sup> .....	11

## 1 Introduction

A key component of a management strategy evaluation (MSE) process is engagement with stakeholders involving both the conveying of information to them and the gathering of input from them. Good engagement between the Management Strategy Advisory Board (MSAB) and its stakeholders during the MSE process will help ensure that stakeholders understand, contribute to, and support the outcomes of the process. The MSAB currently engages with its stakeholders in an ad hoc fashion; this outreach plan is intended to support improved and coordinated engagement.

The MSAB outreach plan described here in this document concerns:

- *why* stakeholders should be engaged (i.e., outreach objectives);
- *who* the MSAB should engage (i.e., the target audience);
- *what* content is delivered and *what* feedback is gathered (i.e., outreach topic matter); and
- *where* and *when* and *how* to engage this audience (outreach tools and implementation).

The plan was developed based upon our review of MSAB documentation, interviews with MSAB members in September 2015, discussions with the MSAB during our presentation of a draft outreach plan at the October 1<sup>st</sup> and 2<sup>nd</sup> 2015 MSAB meeting, reviews of outreach strategies used by other similar organizations, and comments from IPHC staff and MSAB co-chairs. A summary of key feedback from our interviews with MSAB members is presented in Appendix A.

Note, though, that the strategy presented in this document is solely Compass' recommendation for outreach. Compass advises the MSAB to continue to shape its outreach activities based upon further discussions amongst itself and over time as experience in the MSE and with outreach itself is accumulated.

## 2 Outreach Objectives

Consistent with the goals of MSE, the interests of the MSAB, and international principles of stakeholder engagement (see Appendix B), MSAB outreach should seek to:

1. inform stakeholders of MSAB activities and progress in a timely and consistent manner and with the appropriate amount and type of information;
2. gather stakeholder input on MSE issues important to stakeholders and be responsive to this input; and
3. excite stakeholders about the MSE process, stimulate their engagement in the process, and foster positive relationships between the MSAB and stakeholders.

The first objective is about getting information out to stakeholders, the second about bringing information back into the MSE process, and the third about making the MSE process a positive force in the Pacific Halibut community.

It's important to note that the three objectives are inter-related. The first objective is a foundation for the next two, as good input rests upon a sound understanding of the MSE process, and stakeholder sentiment towards the MSE process is a function of what they know about the process. The third objective also rests upon successful implementation of the second objective, as stakeholders will only have a positive sentiment towards the MSE process if they feel that they are being properly involved in the process.

### 3 Target Audience for Outreach

Stakeholders of the Pacific Halibut MSE process are all those parties who have a stake in the outcome of the MSE process. It is these stakeholders that form the target audience for outreach.

To determine who these parties are, the basic questions the MSAB can ask itself are: who would want to know what we're doing, who has important information that will be helpful in our MSE, and who will our recommendations to the IPHC affect?

With these questions in mind, stakeholders for MSE outreach include:

- harvesters (commercial, Tribal/First Nations, and recreational), including harvesters of non-directed fisheries,
- processors,
- regulators, and
- conservation, community development, and other non-governmental organizations (NGOs) focused on fishery issues.<sup>1</sup>

All of these stakeholder groups except NGOs and non-directed harvesters are currently represented on the MSAB by board members. However, it is important to remember that it is the constituents of these stakeholder groups – the people represented by board members – that are the target audience for outreach. As discussed in the October 1<sup>st</sup> and 2<sup>nd</sup> 2015 meeting, MSAB outreach should be focused on stakeholder constituents, i.e., the grassroots, and engagement with regulators and stakeholder groups themselves should go through IPHC communication channels unless otherwise decided by the IPHC.

### 4 Outreach Topic Matter

The three objectives of informing, gathering input, and exciting stakeholders shape the topic matter of outreach. The topic matter presented below by objective should form the content of outreach materials, whether written or spoken.

#### 4.1 Topic Matter for Informing Stakeholders

Stakeholders should be informed of several fundamental characteristics of the MSE process and the MSAB so that stakeholders know what the MSE and MSAB are. More specifically, stakeholders should be informed of: the overall objectives of MSE; who the MSAB is, and what its role is; and who sits on the MSAB, how decisions are made within the MSAB, and the MSAB's role in Halibut fishery management. As the MSE progresses, stakeholders should be informed of key decisions, outputs, and results such as: fishery management objectives; the types of management procedures that are being evaluated; evaluation results; and recommendations to the IPHC. At times it may also be beneficial to inform stakeholders of key issues facing the MSAB so that stakeholders have context for MSAB activities, such as bycatch impacts on stock dynamics.

The MSAB should be cautious about trying to pass on too much information to stakeholders, though. It is less important for technical details and mundane aspects of the MSE process and MSAB to be shared; communications to stakeholders should be concise and focused on what really matters to stakeholders, as too much information can dilute key messages but also make engagement with the MSAB onerous.

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<sup>1</sup> Scientists and other technical experts with skills, knowledge, and expertise in MSE-related matters might also be the target of outreach if circumstances arise where these people might benefit from being kept abreast of MSAB activities or if these people might have input that is valuable to the MSAB.

## 4.2 Topic Matter of Input to be Gathered

Providing thoughtful input takes effort, and so the MSAB should focus on gathering input from stakeholders only when necessary. Gathering input consumes MSAB (and potentially IPHC) resources, but also consumes stakeholders' time and energy. However, stakeholders are stakeholders because they have a stake in the outcome, and therefore they will want at times to influence the MSE process and see that their input is being used. If stakeholders don't feel that they have the opportunity to influence the outcome of the MSE and don't feel that the MSAB is responsive to their input stakeholders may become disinterested at best or hostile at worst to the MSAB.

So when is it the right time to gather stakeholder input? The answer is multi-dimensional and is about ensuring that the MSE process rests upon the highest quality information possible, but also about promoting and living up to the ideals of democracy, transparency, and accountability. Stakeholders can provide information that the MSAB doesn't have, such as on-the-ground knowledge about how well a management procedure might or might not work, and so the MSAB should seek out stakeholder input to improve the MSAB's information base. Stakeholders will also want to have their voices heard. The most important time for providing a space for this voice is when subjective items – such as fishery objectives or trade-offs between management procedures – are being considered to ensure that evaluation is consistent with stakeholder interests and values.

As highlighted in Appendix B, the extent and role of stakeholder input is a function of how engaged the MSAB wants stakeholders to be in the MSE process, and how engaged stakeholders want to be involved. Lesser engagement means that input is sought at more limited times, and more engagement translates increasingly towards stakeholder decision-making power. Our understanding is that stakeholder engagement should be at a level somewhere in the middle of the spectrum, with engagement focused on consulting and involving stakeholders over strategic items and at important decision points, but the MSAB may wish to discuss the appropriate role of stakeholders in the MSE process further.

## 4.3 Topic Matter to Excite Stakeholders

Exciting stakeholders about the MSE process, or 'creating buzz', is a third objective of MSAB outreach. This buzz is grounded in stakeholders having both a good understanding of the MSE process (especially its possibilities for positive change in the fishery) and a feeling that the process is interested in their views and is responsive to their input. Therefore, the topic matter relevant to the third objective is what is already described: passing on the right information to stakeholders so that stakeholders know what the MSE process and MSAB are about and doing, and gathering input from stakeholders on the things that really matter to stakeholders. Additionally, though, the MSAB should be sure to convey exciting information to stakeholders, such as important milestones reached and successes achieved, but also how the MSAB has used stakeholder input to shape the MSE process.

# 5 Outreach Tools

## 5.1 Overview of Outreach Tools

The MSAB currently employs several outreach tools including: using the MSAB website to provide access to MSAB documents and meeting materials; board members sending emails to stakeholder constituents; and board members engaging in informal "dock talk" discussions with stakeholder constituents. These tools are unlikely to be sufficient in terms of achieving MSAB outreach objectives.

To improve engagement the MSAB can modify their use of existing outreach tools and begin to use several additional outreach tools. Table 1 cross-references outreach tools with audiences and outreach

objectives, and the following subsections describe how these tools might be employed by the MSAB in its outreach activities. Note that some tools are ‘active’ in that they entail the MSAB actively contacting, and in some cases gathering information from, stakeholders, while other tools are ‘passive’ in that information is simply provided to whoever seeks it. Active forms of outreach are in general more effective at building relationships and also have the benefit of giving the MSAB the ability to respond and correct misunderstandings and misgivings about the process, but passive forms of outreach are still helpful as they help inform stakeholders and help build relationships by demonstrating transparency and an interest in engaging stakeholders.

**Table 1. Outreach tools by audience and objectives that each tool can address.**

Outreach Tool	Audience	Relevant Outreach Objectives		
		Objective #1: Inform	Objective #2: Input	Objective #3: Excite
Emails from board members	constituents of MSAB member representatives	✓	✓	✓
In-person interaction	constituents of MSAB member representatives	✓	✓	✓
Stakeholder surveys and structured feedback	all stakeholders, i.e., constituents of MSAB member representatives but also constituents of other stakeholder groups not represented on MSAB	✓	✓	✓
Presentation support	MSAB members	✓		✓
MSAB website	Pacific Halibut stakeholders and public	✓	✓	✓
MSAB meeting summary (including executive summary)	all stakeholders	✓		✓
Terms of reference	MSAB members (existing and new)	✓		
MSE Tool manual	MSAB members (existing and new)	✓		
Open-house	all stakeholders and public	✓	✓	✓
Allow observers at MSAB meetings	stakeholders not already represented on MSAB	✓	✓	✓
Brochures	all stakeholders and public	✓		✓
Social media	all stakeholders and public	✓	✓	✓

## 5.2 Email Updates

Board members currently email their constituents on an ad hoc basis using content written by the board members that use this outreach tool. This tool can be improved through wholesale adoption by all board members and the use of consistent content, formatting, and timing. Alternatively, the MSAB could gather an email list, develop a template for email updates, agree upon email content, and then designate a single person to send emails at designated times to the entire list of email addresses. Content could be derived from meeting summaries, and emails could be timed to go out following meetings and other major events such as when milestones are reached in the MSE process.



### 5.3 In-Person Interaction

Some board members currently engage with their constituents at natural gathering points, such as docks (“dock talk”), fishing meetings (e.g., annual IPHC meetings), or elsewhere. This tool can be helpful at spreading information and building relationships, but the MSAB can lose control of the messages being passed on if there is no plan ahead of time among MSAB members for what information is passed on and how. This tool can be improved through wholesale adoption by all board members and the use of consistent messaging and timing. As with email updates, content could be derived from meeting summaries, and this interaction could be timed to follow meetings and other major events such as when milestones are reached in the MSE process.

### 5.4 Stakeholder Surveys and Structured Feedback

As the MSE progresses and the MSAB identifies topics that may benefit from input of stakeholders – such as with respect to trade-offs or appropriate management procedures – the MSAB should consider using surveys or other means to gather input from stakeholders in a structured fashion. Surveys and similar tools gather input, but depending on how they are written and carried out they can also help inform and excite stakeholders. There are numerous online survey tools that could be used to engage with stakeholders, such as Survey Monkey, but the MSAB could also gather information by emailing a short list of questions to stakeholders or by developing and emailing a more lengthy Microsoft Word-based survey document (with answering structured using form controls), hosting a poll on the MSAB website on key questions, conducting telephone interviews, or gathering input at meeting booths. To maximize participation, the MSAB should limit the extent to which stakeholders are requested to provide input, both in terms of how often input is sought and in terms of the number of questions and degree of effort required to respond to individual surveys.

### 5.5 Presentation Support

MSAB members make presentations from time-to-time to the IPHC and may at times present to stakeholder groups. The MSAB can provide support to members making presentations by providing: a powerpoint template; ready access to key content (e.g., overview of the MSE process, graphics illustrating the MSE process, slides with content on objectives and management procedures, information on milestones reached, etc.); and editing support (i.e., other board members and staff offering to review and comment on draft slide decks). The MSAB could use its existing online storage site to store presentation resources.

### 5.6 MSAB Website

The IPHC currently hosts pages on the MSAB with content on the role of the MSAB, its membership, meetings (including links to YouTube recordings of meetings), and related reference documents. These pages can be improved through some modifications to its structure and with the posting of some additional content.

1. Improve content on the **“Management Strategy Advisory Board”** homepage. This page could be improved by adding content regarding:
  - MSE and MSAB objectives, thus covering generic objectives of MSE processes but also the specific objectives of the MSAB with respect to improving management of Pacific Halibut;
  - the timeline of the MSE process, and key milestones for the Pacific Halibut MSE (including indication of where the MSE is currently at; this portion of the page would require updating over time);

- overview information on the MSAB meeting cycle and how the MSAB makes decisions; and
  - how the MSAB interacts with other IPHC advisory bodies (this could take advantage of a diagram shown by Bruce Leaman at the October 1<sup>st</sup> and 2<sup>nd</sup> 2015 meeting).
2. Add a new page titled **“More Information About the Pacific Halibut MSE”**. This page could present more detailed information on:
    - performance measures;
    - management procedures under consideration; and
    - the IPHC MSE Tool (what it is and how it is being used, and if a user manual is developed for the Tool this page could include a hyperlink to the manual) and sample evaluation results.
  3. Rename the current page entitled “MSE References” to the more commonly used title **“Links”**. On this Links page rename some of the important reference material links so that the content within the document is more apparent to the user (some of the MSAB members we interviewed found it difficult to find particular reference documents). For example, the link titled “MSE Discussion Paper” contains much of the information we would expect to see in a MSAB Terms of Reference, and the link title “Harvest policy 2007 (RARA paper)” could be elaborated upon to further explain the content. Also, where multiple references are provided under a title the references could be ordered in terms of importance and relevance, or in terms of complexity, and this ordering could be explained on the page. As well, viewers could benefit from a section regarding important IPHC research results, stock assessments, and other committee reports relevant to the MSE.
  4. Add a new page called **“MSAB Governance”**. Under this link readers would be able to access a web-formatted version of the MSAB Terms of Reference (ToR; see section 5.8 below). At present most governance information is spread throughout past presentations, meetings minutes, and other MSAB documents, making it challenging for interested parties to understand the MSAB and its role.
  5. Under **“MSAB Meetings”** announce upcoming meetings and the topics of these meetings in addition to what is currently provided on this page.

It may be useful to also develop a **“Current Issues”** page that acts as a place to summarize and highlight the most pressing issues facing the MSAB and how these issues are being addressed by the Board, though this page would require periodic updating.

## 5.7 MSAB Meeting Summary

The MSAB should continue to write and publish meeting summaries as is but improve the summaries in two ways. First, summaries should be published within a short time after meetings are complete, perhaps within a month of meetings. Second, an executive summary of the meeting summary should be developed to provide board members with a quick overview of the more detailed summary (this could be the basis for outreach tools such as email updates and in-person interaction).

## 5.8 Terms of Reference

Terms of reference (ToR) are useful means of documenting a body’s purpose and objectives, membership, decision-making, and other procedures and characteristics. The MSAB’s ToR are presently spread across a variety of meeting and other documents and as such are not gathered into one place. As well, certain things such as decision-making procedures have not yet been articulated.

We suggest that a ToR be developed and include the following information, including topics not typically captured in ToRs but that would be useful to have documented in the same locale:

1. Context
  - overview statement on the need for improved management of Pacific Halibut
  - issues that the MSAB aims to address
  - list of relevant fisheries law and policy
  - list of stakeholders
  - generic objectives of MSE processes
2. MSAB Organization
  - MSAB membership
  - roles and responsibilities of board members and others involved (such as IPHC staff, observers, outside contractors, and guest participants and observers)
  - decision making procedures
  - brief description of how the MSAB interacts with the IPHC, other IPHC advisory bodies, and other stakeholder groups
3. MSE Objectives and Process
  - objectives of the Pacific Halibut MSE and MSAB
  - objectives for the fishery and related performance measures
  - MSE process timeline and milestones
  - description of MSE model and other main tools being used in MSE
4. MSAB Outreach
  - objectives of outreach
  - outreach audience
  - description of main outreach tools

## 5.9 Manual for the IPHC MSE Tool

The MSE Tool is playing a critical role in the MSE process, yet the tool is not readily-accessible for all users, especially newcomers. Written for the layperson, a manual would help users more easily understand and use the tool. The table of contents for the manual may include:

- an introduction outlining the purpose of the tool;
- step-by-step instructions on how to use the tool;
- a description of tool limitations and assumptions;
- a summary of the management questions the tool is and isn't well-suited to answer;
- summary results and brief discussions of a small number of "typical" parameter changes to the tool to help illustrate the tool's capabilities and functionality and aid users in understanding how to use the tool; and
- frequently-asked questions.

## 5.10 MSAB Open-houses

Open-houses, where stakeholders not directly involved in the MSE can learn about the MSE and interact with MSAB members, could be a useful form of outreach in the future when the MSAB has reached an important milestone and achieved progress on topics that are interesting to the wider Pacific Halibut stakeholder base. Open-houses could be hosted in Seattle, Vancouver, or elsewhere, and could be held in conjunction with the annual IPHC meeting or other major fishery and fish management events. Open-houses could be used to inform stakeholders but also gather feedback. This tool would require the development of interesting display material and would benefit from the attendance of MSAB members to interact with stakeholders. Importantly, though, any use of this outreach tool should respect the fact that the MSAB is but one advisory body to the IPHC and that it is typically the IPHC's role, and not that of its advisory boards, to interact with the public.

### 5.11 Allow Observers at MSAB Meetings

To provide transparency to stakeholders interested in the MSE process, but also as a means of involving stakeholders with particularly relevant information (e.g., bycatch harvester), MSAB meetings could be opened up to a wider audience of observers. Depending on the meeting, meeting session, and observer, observers could also be granted full participation rights.

### 5.12 Brochures

To assist with in-person interactions and for use in open-houses, the MSAB could create brief, colourful, and informative brochures for handing out to interested persons. The brochures would cover the basic information presented on the website about pressing issues facing the Halibut fishery, what the MSE and MSAB are and are hoping to achieve, the main steps in the MSE process, how stakeholders can get involved, and contact information for the MSAB.

### 5.13 Social Media

The IPHC currently uses social media, but not for MSE- and MSAB-related matters. However, given the popularity of social media with some people, and the interactive possibilities of the medium, the MSAB might give consideration to using social media in the future, such as when input is needed or when the MSE has reached an important milestone.

## 6 Outreach Implementation

At the October 1<sup>st</sup> and 2<sup>nd</sup> 2015 MSAB meeting, Compass presented board members with three outreach plan options differentiated in terms of level of incremental effort. Following discussion several members indicated that moderate incremental effort was desirable though outreach should match where the MSAB is in the MSE process (note that the MSAB was not formally canvassed for an official position in the meeting on what level of incremental effort to pursue). Assuming that the entire MSAB agrees with those who supported moderate incremental effort, the table below summarizes implementation details for specific outreach tools that should be used.

**Table 2. Outreach activities consistent with moderate incremental outreach effort.**

Outreach Tool	Description	Responsible Party	Cost
<b>Email updates</b>	see section 5.2	MSAB members, with preparatory work by MSAB technical committee	Board member in-kind
<b>In-person interaction</b>	see section 5.3	MSAB members, with preparatory work by MSAB technical committee	Board member in-kind
<b>MSAB Presenter Support</b>	see section 5.5	IPHC staff and MSAB members	IPHC staff and MSAB in-kind
<b>Improvements to website</b>	see section 5.6	IPHC staff	IPHC staff in-kind
<b>Meeting summary</b>	see section 5.7	IPHC staff or facilitator	IPHC staff in-kind or facilitator fee-for-service

We recommend the following steps now be undertaken to implement the outreach plan:

1. Confirm with staff and board members by end of 2015 their ability to undertake the suggested outreach plan activities outlined in Table 2.
2. MSAB technical committee (i.e., co-chairs and agenda committee, or their successor) engage with IPHC staff regarding a protocol for when and how the MSAB should engage with its constituents and other stakeholder groups but also how regulators and other parties that the IPHC interacts with are engaged in MSAB activities (see section 3 above for context).
3. MSAB technical committee (i.e., co-chairs and agenda committee, or their successor) finalize a plan (who, what, when, how) for email updates and confirm this plan with rest of MSAB members by end of year 2015. Implement email updates tool immediately following May 2016 meeting.
4. MSAB technical committee (i.e., co-chairs and agenda committee, or its successor) call on MSAB membership by end of 2015 to begin using executive summary materials from MSAB meeting summaries as the basis for their in-person interactions. Request that MSAB members prepare to share their experiences with the group at May 2015 MSAB meeting as part of an outreach session at the May 2015 meeting.
5. Staff prepare a MSAB powerpoint template for MSAB public presentations and gather or develop several slides that provide an overview of the Pacific Halibut MSE process that can be used in presentations by MSAB members by end of year 2015. Co-chairs from October 2015 meeting engage with staff about any other support need for upcoming IPHC annual meeting.
6. Staff draft revised and updated website content by end of November 2015. Staff confirm edits and changes with MSAB by end of December 2015 prior to new web content going live in early 2016.
7. Staff coordinate with MSAB co-chairs and agenda committee, or their successor, to improve the organization and usefulness of the MSAB's Office 365 on-line workspace for members' use in support of the Board's work and outreach activities.

Compass is implementing the changes to meeting summaries (notably development of executive summaries) for the October 1<sup>st</sup> and 2<sup>nd</sup> 2015 meeting summary.

In the future, the MSAB may also want to consider formal evaluation of the MSAB outreach plan to gauge its success at reaching its outreach objectives. Possible criteria used in such an evaluation could include:

- stakeholder comprehension of the MSE process (indicating how well the outreach tools are informing stakeholders);
- response rates to constituent surveys and feedback documents, and the volume of correspondence and contact by stakeholders (indicating how well the MSAB is gathering input from stakeholders); and
- the content and nature interactions with stakeholders, including the level of satisfaction among stakeholders with the MSAB's outreach activities (indicating how well the MSAB is generating interest in the MSE process among stakeholders).

## Appendix A: Summary of Outreach Interviews

This appendix presents a summary of input gathered in the 11 interviews we conducted with MSAB members.

Key challenges with MSAB outreach noted by interviewees included:

- outreach activities conducted by US MSAB members may be more challenging than that for Canadian MSAB members given the larger number of regulatory agencies and organizations involved;
- the infrequency of MSAB meetings can make it challenging for MSAB members to recall meeting content;
- the need to confront stakeholders' lack of understanding of the MSE process and associated fears that the MSAB may exert a disproportionate amount of influence on stock assessment and other technical considerations that have traditionally been the purview of the IPHC; and
- varying levels of technical expertise on the MSAB and within each members' constituent base, affecting such things as each members' ability to contribute equally and communicate similarly in in-person interactions with stakeholder constituents.

Interviewees' suggestions for improving MSAB outreach included:

- waiting to conduct outreach when the MSAB had substantial progress to report, such as tangible modeling results;
- providing stakeholder constituents with consistent and more regular updates on MSAB activities;
- meeting minutes need to be distributed more quickly;
- develop recommended approaches for members on how to communicate complex topics and ideas to constituents;
- staff could provide updates on MSE progress between meetings to MSAB members;
- update existing MSE presentations and other process summaries into a quick reference document that summarizes the MSE process and its objectives and timelines;
- develop a user manual for the Shiny Tool outlining the model assumptions and limitations along with a summary of the management questions it is well-suited to answer and those it is not well-suited for; and
- gathering feedback from constituents on outputs of the Shiny Model to improve the understanding and progress of the MSAB.

## Appendix B: Types of Public Participation

The International Association for Public Participation identifies five types of participation and associated goals and ‘promises’ for each (Table 3). The columns ‘inform’, ‘consult’, and in some cases ‘involve’ may be the most relevant to MSAB outreach.

**Table 3. The public participation spectrum of the International Association for Public Participation.<sup>1</sup>**

	Inform	Consult	Involve	Collaborate	Empower
<b>PUBLIC PARTICIPATION GOAL</b>	To provide the public with balanced and objective information to assist them in understanding the problems, alternatives and/or solutions.	To obtain public feedback on analysis, alternatives and/or decision.	To work directly with the public throughout the process to ensure that public concerns and aspirations are consistently understood and considered.	To partner with the public in each aspect of the decision including the development of alternatives and the identification of the preferred solution.	To place final decision-making in the hands of the public.
<b>PROMISE TO THE PUBLIC</b>	We will keep you informed.	We will keep you informed, listen to and acknowledge concerns and aspirations, and provide feedback on how public input influenced the decision.	We will work with you to ensure that your concerns and aspirations are directly reflected in the alternatives developed and provide feedback on how public input influenced the decision.	We will look to you for advice and innovation in formulating solutions and incorporate your advice and recommendations into the decisions to the maximum extent possible.	We will implement what you decide.

Source: <http://iap2canada.ca/page-1020549>.



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