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THE ROAD



Expert Panel Process for **DECISION MAKING**





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About **FAST**

The needs of natural resource managers and policy makers often outstrip existing science and data. FAST is a process to help National Estuarine Research Reserves and others working at the interface of science and management to collaborate with experts to develop timely, science-based solutions to environmental problems. It provides an iterative, weight-of-evidence approach for these experts to reach general agreement, though not necessarily unanimity, around technical recommendations.

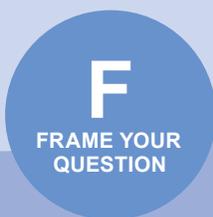
FAST is helpful when science-based solutions are needed, but data and research are vague or insufficient. For example, it may be appropriate when a question could be addressed with intensive site specific research, but time or other resources are lacking. Alternatively, you may want to use it when there are differences in expert opinion around the most appropriate solution.

FAST is adaptable and can be approached with different levels of rigor depending on the situation at hand. It can only work if you have sufficient resources and access to professionals with the right expertise and time to help.

FAST was refined as part of Credit for Going Green, a project that developed consensus-based recommendations to help New Hampshire stakeholders use buffers to meet pollution reduction targets for stormwater permits. The project team synthesized their experience into a four-stage process for working with expert panels. FAST is not unique; it incorporates common best practices from other approaches to group decision making. This guide is for people who would like to use and adapt these techniques when engaging experts. It includes lessons learned, tools, and sample work products generated by the Going Green team.

FRAME YOUR QUESTION

Review previous work that has been done in your area related to the management need you want to address. Check with stakeholders to make sure you are working on a question for which they really need an answer. Look for case studies that exemplify your goals and find a mentor to help you get organized.



ASSEMBLE THE TEAM

FAST involves three groups: a small **core team** that is responsible for getting the work done; a larger **advisory committee** that provides input on panel makeup, the literature review, and how best to communicate results; and an **expert panel** that will make recommendations to address the management need at hand.



SUSTAIN MOMENTUM

Clarify expectations, time investments, roles, and goals for the panel at the outset. Establish a shared foundation of knowledge by synthesizing relevant literature. Throughout, give the panel real work to do and decisions to make, hold directional meetings, and advance decision making between meetings.



TAKE IT ON THE ROAD

Develop a draft set of panel recommendations. Ask your advisory committee to vet them, discuss how they could address the management need, and provide input on an outreach plan. Finalize the recommendations with the panel and share results throughout your professional networks.



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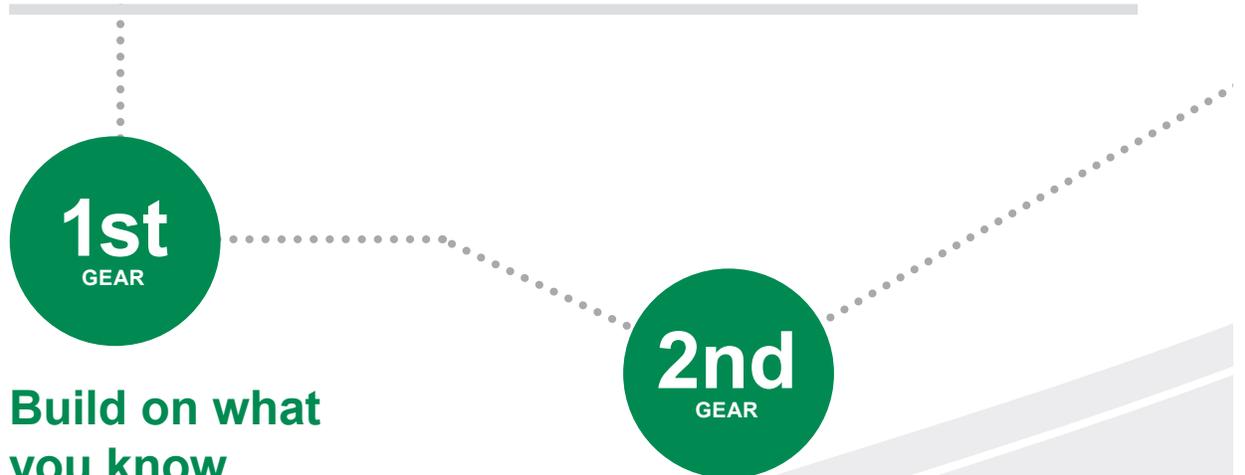
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FRAME YOUR QUESTION

Consider your objective—timely, expert agreement on a solution to a critical local question. While FAST typically requires less time and money than site specific research, it is not without cost. In this step, you'll lay the table for a collaboration that makes best use of previous work and ensures you are asking a question that really matters.



Build on what you know

Review local work that has been done related to the management need. Reserves typically have access to a wealth of knowledge about local management priorities, including needs assessments conducted by the NERRS, NOAA, Sea Grant, and other groups. Likewise, Reserve staff are often members of local professional networks or advisory committees that hold regular meetings or workshops focused on new and persistent management needs.

Through these and other resources, can you confirm that there are perennial challenges related to the management need? What resources, scientific or otherwise, are reportedly lacking to address it? Is it impacted by new or existing regulations? Is it a high conflict issue? Your goal is to enrich your understanding of the issue and frame a draft question for experts to answer. The more specific your question, the more precise you can be when selecting experts.

2nd
GEAR

Check with stakeholders

No doubt framing your question involved some judgement calls. Before you go further, make sure you landed on a question for which people really need an answer. Which groups will use the solution? Touch base with a few representatives through a call, meeting, or focus group. Ask whether the question makes sense. How would they use the answer? Can they recommend thought leaders to consult? What related work is happening? Refine your question with their input and save your notes for designing the process.



3rd GEAR

Find a mentor

Odds are your question is complex and impacts many diverse stakeholders—this is coastal management after all! A mentor experienced in convening panels related to your issue can help you anticipate thorny topics and decision points. Look for case studies that illustrate how your question has been addressed in other places; these can be used to build credibility for your project.

4th GEAR

Secure resources

FAST does not mean cheap. Running a panel requires time and expertise, the cost of which depends on the rigor of your process, staff and skills you have in house, and what experts will contribute. At a minimum, you will need a panel chair who is a subject matter expert (two months); project coordinator with group process skills (two to three months); and someone to channel local stakeholder needs (one month). You may also need communications support to develop outreach products. Budget for up to eight virtual or face-to-face panel meetings and four advisory committee meetings. Be prepared to offer an honorarium to panelists.

GOING GREEN

LESSONS LEARNED

Our goal was to quantify the ability of buffers to reduce pollutant loads so communities could use this information to help meet state regulatory standards for water quality. This need was identified in previous initiatives, including an assessment of community values related to buffers; a regional effort to track nonpoint source pollutants; and pending state stormwater permits. We identified a mentor who had conducted a similar project on Chesapeake Bay and worked with him to refine our approach. Some lessons learned along the way:

- Even though our question was informed by an assessment of community values, it evolved with the input of regulators on our panel. As a result, we developed a solution that may not have been what communities initially wanted. For example, they may have hoped for regulatory credit for existing buffers, not restored or constructed buffers. Had we conducted a focus group with community representatives beforehand, we might have asked a different question and landed on a different solution.
- Having a mentor was key. Ours provided examples of process tools and products to give us a sense of what we were shooting for. He also helped us design a process that was flexible enough to manage forks in the road that would have been difficult to anticipate.
- Referencing a successful case study was key. Ours demonstrated that another region had successfully achieved what we were attempting. This built confidence and provided a reference as the panel’s conversation entered new waters. However, we learned how important it was to compare local contexts (e.g., soil types) to those in the case study.
- Expert panels require a lot of process support. This was noted by reviewers when an early proposal for funding was rejected. With input from our mentor, we updated the next proposal to include more support for group process and communications, freeing up the chair to advance the technical thread of the conversation. In the end, we found we could have used even more support for process.

TOOLS & REFERENCES

PROJECTS THAT INFORMED
GOING GREEN: POLLUTANT
TRACKING, COMMUNITY
ASSESSMENT, AND NH
STORMWATER PERMIT

CHESAPEAKE
BAY PANEL
PROTOCOL

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ASSEMBLE THE TEAM

FAST engages three groups with mutually supporting responsibilities: a small core team that is responsible for getting the work done; an advisory committee that provides input throughout the project; and an expert panel that makes recommendations to address your management question. In this step, you'll select people with the appropriate skills and organizational affiliations for each group—this is critical to the success of your project!

1st
GEAR

Form the core

The core team drives FAST. They provide overall vision and guidance, shepherd the panel's deliberations, engage the advisory committee, develop products to share panel recommendations, and conduct outreach to make this information accessible to stakeholders. At a minimum, the core should include a subject matter expert who is willing to serve as panel chair and a group process professional who can support the chair during and between panel meetings. Additional desirable skills sets include communications (to support product development) and the ability to channel the perspectives of intended users. We recommend the core be as lean and nimble as possible!

2nd
GEAR

Convene your advisors

The advisory committee is the sounding board for the core team. At the start of the process, the committee offers input on the management question, suggests panelists, and recommends literature for the preliminary review. They may provide input during the panel's deliberations but it's best to leave this up to the panelists. It may be easier for them to be candid if they know their conversations are confidential until they are ready to share them. Ultimately, the committee provides input on the utility of panel recommendations and how to package them for wider dissemination. Hopefully, they will serve as ambassadors for the recommendations. The advisory committee should include intended users of panel decisions and representatives of important stakeholder groups. Develop a solicitation for your advisory committee that clearly lays out the goals of the project, their role in relation to the panel, and their time commitment.



GOING GREEN

LESSONS LEARNED

Our project was driven by a small core team who refined the concept, secured funding, and recruited the advisory committee and panel. The eleven-person advisory committee was composed of community representatives, regulators, technical assistance providers, and stormwater engineering consultants. The eight-person panel included two watershed hydrologists, a soil scientist, a GIS specialist, a fisheries biologist, state and federal regulators, and a former consultant. Some lessons learned along the way:

- The more specific your management question, the more specific you can be when selecting panelists who can make recommendations that are aligned with management needs.
- Including more engineers on the advisory committee and engaging them more often may have helped focus and advance panel decision making.

3rd GEAR

Recruit the panel

The six-to-eight-person expert panel makes science-based recommendations to address the management question. Selecting panelists could be the most significant step of the FAST process. Not only is it critical to have the right expertise in the mix, it's important to choose people who understand the management needs behind the question and work well with others by listening respectfully and compromising when necessary. Be sincere about why you need their expertise; don't waste their time just to be inclusive! Depending on the rigor of your process, panel participation could take two weeks or more of their time. Develop a solicitation to explain the panel's purpose, time commitment, the type of expertise needed, and whether you are able to offer an honorarium.

TOOLS & REFERENCES

[PROJECT OVERVIEW](#)

[TIMELINE,
MILESTONES, & ROLES](#)

[PANELIST
SOLICITATION](#)

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SUSTAIN MOMENTUM

Despite its name, FAST can feel more like a marathon than a sprint. Progress will not be linear, and you will revisit previous decisions as group understanding evolves. Shepherding the panel toward its goal requires you to be patient, persistent, flexible, and above all, prepared.

1st
GEAR

Get organized

Start by developing a draft charter that includes the panelists' charge (to address your management question), a time line with milestones, and a process for decision making and for communicating files and ideas between meetings. Before the first meeting, ask panelists to review the charter. Revise it with their input when you meet. Some things to consider as you write up the charter:

- How many meetings are really needed to cover the issue? (When possible, hold face-to-face meetings; this builds camaraderie and familiarity.)
- Spell out best practices you plan to follow.
- Propose a decision making process to ensure opposing points of view are respectfully discussed and to support a path toward agreement.
- Suggest a platform that supports group file development, sharing, revision, and storage.

2nd
GEAR

Compile the science

The chair should establish a shared foundation of knowledge by conducting a scaled review of scientific literature before the first meeting. The goal is to compile locally relevant science that will support the decisions the panel will have to make. Ask your advisory committee and mentor to suggest literature and help you identify specific topics around which to organize the review. One of the panel's first tasks will be to read this review, decide whether it is sufficient to proceed, and suggest additional citations to consider. This review will evolve throughout your process. Ultimately, it will support the panel's final recommendations.





Keep moving forward

It's critical to give the panel real work to do and decisions to make. The chair and process person should work together to plan directional meetings that tee up assumptions and decision points for panelists to discuss. Take good notes, or even better, record and transcribe meetings. You'll need these notes to keep the conversation moving forward and to develop final recommendations. The panel may not get to a decision you had hoped for in a meeting—that's okay! The important thing is to support them in continuing to exchange ideas and opinions.

The time between meetings is often just as important to decision making. Leverage it by asking panelists to review and approve notes from the previous meeting, confirm whether decisions were made, indicate whether further discussion is needed, or take on discrete tasks. An online survey tool is a great way to support these interactions. Use survey results to design the next agenda and send it to panelists at least a week in advance, along with all the survey responses. Ask them to be prepared to speak to their survey comments at the next meeting.

TOOLS & REFERENCES

PANEL CHARTER

SAMPLE BETWEEN MEETING SURVEY

INITIAL LITERATURE REVIEW

SAMPLE AGENDA & PREP

CENTER FOR LEADERSHIP AND ORGANIZATIONAL CHANGE CONTINUUM OF CONSENSUS

SAMPLE PANEL MEETING POWERPOINT

GOING GREEN LESSONS LEARNED

Our project took three months longer than anticipated, in part due to the complexity of the science and regulatory framework surrounding a buffer's ability to mitigate nonpoint source pollution. The many physical factors that influence buffer performance are interdependent, and it was difficult to decide which to address and in what order. Fortunately, our panelists were patient and respectful of each other and the process. Some lessons learned along the way:

- Having a chair who was well-respected and perceived as neutral was key. He conducted a preliminary literature review that gave the panel a common starting place and helped frame initial discussions.
- While there are challenges associated with every online collaboration platform, we found Google Drive to be generally effective for file sharing, storage, and document development.
- Our panel chose not to seek input from the advisory committee during their process. In retrospect, checking in on the proposed solution with the committee may have led to recommendations that were closely aligned with community needs.
- The Center for Leadership's Continuum of Consensus was an excellent tool to support decision making. It gave panelists a range of options that kept us moving forward.
- Getting to clear decisions would not always happen in meetings. As a result, we used meeting notes review and surveys to confirm decisions or indicate more discussion was needed. This was accessible on Google Drive so panelists had a bread crumb trail to past decisions and could see how they were influencing future agendas.
- Our core team used a progress log to stay engaged. We updated it when a significant chunk of work was done, when we needed input from each other, and to record meeting notes. This made it easier to plan, keep the advisory committee informed, and report to our sponsor.
- A survey indicated panelists found the process to be effective and conducive to collaboration and would recommend it for other management questions.

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In the final phase, you will work with the panel to synthesize recommendations and package them in a technical memorandum and/or a more comprehensive final report. You will vet these with the advisory committee and solicit their input on how best to package and share them with intended users of results. Last, you will get the panel's final approval to begin your outreach.

1st
GEAR

Developing recommendations

When it's time to develop draft recommendations for panel review, you'll be glad you kept good notes and a record of past decisions! These will support the synthesis and help you field input from panelists.

Start by considering your audience—who will use these recommendations in their work? Package the recommendations as a technical memorandum that includes information that will build credibility and makes it easier for this audience to use them. The memo could include a synopsis of panel expertise and key decisions, a glossary of relevant terms,

and examples of how the recommendations could be used. In some cases, for example when the recommendations influence regulatory compliance, you may also need to create a final report that includes more information about the panel process and the local contexts that motivated the process.

Share the draft with your panel for preliminary review. Be prepared for them to want to re-open old ideas and decisions—getting everything down in writing has a way of identifying topics that people were uncertain about or interpreted differently. You may need to hold an additional meeting to discuss substantial changes. When the chair is reasonably assured of general agreement by the panel, it's time to put your advisory committee to work.





Advisory committee check in

Share the draft technical memorandum with your advisory committee and convene a meeting to discuss it. As you plan the agenda, include an overview of the process and the recommendations and leave plenty of time for questions. Consider adding a focus-group-style component that allows each committee member to discuss the relevance of the recommendations to his or her work and what additional information or communications products would be useful. Record or keep good notes, not only to inform your decisions to develop products, but also to create messages that will support your outreach to different audiences.



Wrap it up & roll it out

Review the technical memorandum with your advisory committee's input in mind. Will additional information make it more clear or accurate? Is there language that needs to be translated to make it more accessible? Make the necessary final changes and circulate it to your panel for final review and approval. If any significant changes were suggested by the committee, be sure to flag them for panelists.

While the report is under review, develop an outreach plan. Consider not only the primary audience for the technical memorandum, but other groups who should be aware of the recommendations because they may be in a position to influence their use. As you think about how best to reach these audiences, consider working through existing professional networks, piggybacking on meetings that are already planned, or presenting at local conferences. Depending on the audiences you have to reach, you may have to create different communications products, for example, non-technical summaries, illustrative graphics, or a variety of PowerPoint slide decks.

GOING GREEN

LESSONS LEARNED

We were fortunate to have a thoughtful advisory committee who provided excellent feedback on our technical memorandum and creative ideas on how to share the panel's recommendations. There was interest in exploring whether the results could be applied in other New England states and in using the FAST process to address other issues. Members of the core team, the panel, and the advisory committee have already begin to share recommendations at local, state, and regional meetings. Some lessons learned along the way:

- It's important to reserve some budget for outreach or communication needs that come up after the final advisory committee meeting.
- Give panelists plenty of time to review the final reports and ask them to put this review on their calendars to emphasize their responsibility.
- Some advisory committee members were very interested in sharing project results with the engineering community. If we had more engineering perspectives on the committee (or had done outreach to this audience), we could have identified other outreach products and opportunities.

TOOLS & REFERENCES

