

November 24, 2010

**JACKSON/TETON COUNTY COMPREHENSIVE PLAN UPDATE**  
**RESPONSES TO FACILITATION PROFESSIONAL INTERVIEW QUESTIONS**  
**Submitted By Design Workshop**

*Goal: Conclude a 3-year Comprehensive Plan update process through a 6-month elected official review without diluting the content of the Plan*

**1. WHAT IS YOUR FACILITATION STYLE?**

**a. General philosophy?**

Our philosophy is based on our forty years of experience practicing in mountain and resort communities throughout the Rocky Mountain West. We are familiar with addressing the conflicts of environmental preservation versus the needs of a growing community, along with the many other issues that are unique to mountain resort communities. Specifically, our understanding of issues in Teton County stems from working for the Wyoming National Parks, practicing on both sides of the Tetons, resolving land development for some of the largest land parcels in the county (Grand Targhee and Teton Village), participating on a ULI Advisory Panel for the Town of Jackson and providing facilitation services for the Teton Village Association.

Fundamentally, we believe that the role of a facilitator is to impartially help participants navigate a conversation to arrive at supportable conclusions. Conversations that involve long-range planning for land use are always complex, especially when multi-jurisdictions are involved. We enable the participants to pay attention to the content of a discussion while we manage the process by establishing a framework for the conversation and then help the participants stay on track.

We adapt to the dynamics of the conversation, drawing from a large toolkit of techniques to fit unique circumstances. Part of the creative challenge of facilitation is being able to respond to the moment and create new approaches that enable a group to make progress.

To ensure success in your facilitated process, we would:

- Prepare thoroughly by understanding the scope of the conversation, the desired outcomes, the individuals who will participate and the probable issues that might come up.
- Break the conversation into logical themes and topics that allow the participants to tackle difficult issues one-by-one.
- Create a productive, positive environment for the conversation by stimulating group energy and optimism that consensus can be achieved.
- Make sure there is balanced participation in the conversation.
- Identify themes or common threads in the discussion and help the group build on those common threads.
- Summarize and organize ideas to confirm group understanding and create a logical flow for the conversation.
- Use a variety of techniques to mediate disagreements, see below for more detail.
- Help the participants express and deal with conflicting issues to reach consensus.

- Record input using both written text and graphic images (graphic facilitation) to help illuminate the concepts expressed, including inter-related topics and policies.
- Maintain objectivity while helping the group drive toward conclusions.

A great deal of valuable work has been accomplished already in developing the Jackson/Teton County Comprehensive Plan Update. We believe that it is entirely possible to regain the momentum necessary to bring this process to a successful conclusion within your timeframe.

**b. Specific strategies you have used in the past?**

We regularly use all the techniques that are described above; they form the core of our facilitation strategy that consistently leads to positive results.

The following are a variety of techniques we use to mediate disagreements and help the group come to consensus:

- Asking clarifying questions
- Asking focusing questions
- Brainstorming
- Identifying alternatives
- Discussing strengths and weaknesses
- Identify high risk/low risk objections
- Merging/modifying alternatives
- Building criteria lists
- Prioritization matrix
- Rating alternatives
- Establishing creative alternatives
- Converging upon an alternative

A couple of other strategies we use are:

- Put aside decisions when an impasse has been reached and return to the topic later when the group can review it from a fresh perspective (sometimes called the parking lot).
- Point out behaviors that may be interfering with the group's work and suggest alternative approaches.

We have applied these techniques in both small and large group formats. We have incorporated 'pre-work' in some cases to help stimulate thinking prior to the facilitated conversation. We often use graphic facilitation, incorporating the use of graphic images and icons to illuminate the concepts that participants are expressing.

Please also see our Response to the Request for Qualifications for specific project examples and photographs of some of the different techniques we use.

c. An outline of the process you might use to achieve the identified goal?

**Approach**

*“Predictability, measurability and accountability”* are three factors that the Comprehensive Plan strives to incorporate. It is our goal to structure a process for finalizing the Comprehensive Plan that also incorporates these principals. Our approach will be based on the following:

- Gain a full understanding of the process to date, goals for the elected officials and staff, feelings of the community towards the plan and process, items of the plan that are generally agreed upon and issues that need further discussion and resolution.
- Work closely with staff and the elected officials to ensure that we correctly represent the discussions and conclusions of the elected officials.
- Accurately document information gained throughout the process.
- Develop a clear process and schedule with agendas for each meeting.
- Establish regular “check-in” times with the elected officials, the community and staff to make sure the Plan is being updated consistently and accurately.
- We know from experience that this will not be a linear process and that there will be citizens who are not in agreement with the Plan direction and/or that there will be topics that have both strong support and strong opposition. We will apply our extensive experience in facilitation and consensus building to resolve those situations.

**Process Outline**

Please see the attached diagrams that graphically depict our proposed process. Please consider these ideas a starting point for dialogue with staff and elected officials. Together we will develop and refine the process, and determine the appropriate amount of citizen participation.

**Community Input**

We will confirm with staff and the elected officials whether the extensive public outreach program to date has been successful and if citizens have had sufficient opportunities to comment on the most current aspects of the plan. We would like to develop an understanding of whether the public feels that their comments have been heard and incorporated and understand the type of ongoing public involvement the elected officials would like to have moving forward.

***Citizen comment from: North of Town Comp Plan Update Meeting, July 24, 2008***

*“Please clarify. Is the “2nd” draft and the “final” draft just semantics? Or will the public have the opportunity to comment and shape the “final” draft?”*

Based on our experience, and as indicated by the question above, it is likely that the elected officials will consider it important to re-engage the community in this final phase of the Comprehensive Plan. We have designed a process that is focused on the Comprehensive Plan review and finalization with the Commission and Council. At the same time, we have provided for a parallel track community feedback process. We anticipate the elected officials and staff will provide input on this approach and we will refine the process accordingly.

### ***Proposed Meeting Schedule***

In order to be efficient and effective with the elected officials and others' time and budget, we suggest a series of meetings and worksessions that will occur on a twice monthly basis. This approach will allow the elected officials to commit focused productive time to the Comprehensive Plan and to work through the issues (for example, affordable housing, amount of growth or locations for future growth) that need resolution. In addition we will conduct necessary focus group and other citizen meetings around that time. For example, a two to three day period may include two worksessions with the elected officials of up to four hours each on separate days, as well as several focus group sessions on the topics being reviewed that week and for the following period. We will also consider the potential meeting locations to ensure that we obtain input from citizens in town and in all areas of the County.

We will coordinate with staff on bimonthly conference calls that would occur between the meeting periods.

#### **d. How have you incorporated citizen participation into meeting facilitation in the past?**

Currently, in several of the jurisdictions where we work, the elected officials require a significant amount of public outreach and public vetting of ideas, concurrent with and/or prior to their review. Some of the projects in which we have incorporated citizen participation into the elected officials review process include: Burlingame Affordable Housing, Aspen Area Community Plan, Pitkin County Nordic Master Plan, Eagle Area Community Plan, and South Grande Great Streets Initiative and Manchester Road Redevelopment in St Louis, Missouri. In addition, we have participated in numerous land use review processes for a wide range of projects and we are familiar with the ways that Council and Commission meetings are run and the manner in which public input can be included.

Some of the methods we have used include:

- Conduct parallel and related citizen and task force meetings. A spokesperson presents their conclusions to the elected officials.
- Develop an appealing and interactive website where citizens can follow the progress of the meetings and the decision making process.
- Create clear agendas and topics for each meeting and ensure that the meetings stay on topic. Focus citizen comments on the meeting topic.

For the Teton County Comprehensive Plan Update, the Council and Commission members need to have sufficient time to conduct their discussions and deliberations. Therefore, it is important to manage the citizen input as it relates to the process with the elected officials. We have proposed several strategies:

- Conduct parallel citizen task force (or use STAG or TAG) meetings on specific issues and have representatives from the task force present the groups' conclusions on each topic to the elected officials.
- At key times in the process conduct a whole community presentation that may include keypad polling and an open house session. These would likely be held at start up and near the conclusion of this phase.

- Structure the elected officials' meeting and worksession schedule so that there are set times for structured public input.

**2. JACKSON AND TETON COUNTY HAVE DECIDED TO SEPARATE FACILITATION SERVICES FROM THE OTHER SERVICES SOUGHT IN THE RFQ.**

**a. Can you provide solely facilitation services?**

Yes, Design Workshop can provide solely facilitation services as described above.

**b. If yes, who would be your facilitator(s)?**

Our facilitators would be Pam Britton and Suzanne Richman. Pam has extensive experience as a facilitator and is also a teacher of facilitation. She is excellent at bringing successful conclusions to complicated processes and she works effectively in small or large group settings. Suzanne's experience combines a technical understanding of land use issues on a broad range of mountain based projects with facilitation skills. Please see Pam and Suzanne's resumes in the Response to the Request for Qualifications.

**c. What role would support staff play in providing this service?**

Support staff would not play a significant role in providing facilitation services. They may assist with travel arrangements, logistics and project administration.

Richard Shaw, the principal in charge, would be involved in the initial strategy setting and would serve as a resource to the project as needed.

**3. WHAT ARE YOUR RATES AND AVAILABILITY (JANUARY 2011 TO JULY 2011 WITH POSSIBLE EXTENSIONS) TO ATTEND MEETINGS IN JACKSON INCLUDING TRAVEL AND ALL MEETING PREPARATION AND SUMMARY:**

**a. Availability**

Our current workloads allow for the team to be fully engaged in this project for the first half of the year or throughout the year. The members of the project team are extremely excited about this project opportunity. We are committed to accomplishing project goals in collaboration with you and to delivering excellence in every way.

We will be available whenever needed throughout the course of the project for trips to Jackson and also available via telephone, teleconference, email or website. We anticipate further discussion with staff and elected officials to refine the proposed scope of work and schedule. We will adjust our travel plans and availability to best suit the Client's needs.

**b. Hourly billing rates**

<i>Hourly Rate</i>	
Richard Shaw	\$250
Suzanne Richman	\$135
Pam Britton	\$135
Administration/support staff	\$90

One day of either Suzanne or Pam's time is \$1080.

We will not bill more than eight hours of time per day and travel time will be billed at 50%.

**c. Travel Expenses for a two to three-day trip**

We anticipate that we will collaborate with staff and the elected officials to create a schedule for the series of meetings and the meeting agendas. This will allow us to reserve our travel in advance, generally at less expensive rates. However, knowing that people's circumstances and the progress of a plan review change, we have included a range of rates for travel expenses from low to high.

<i>Item</i>	<i>Low</i>	<i>Medium</i>	<i>High</i>
Airfare from Aspen to Jackson Return	\$360	\$500	\$850
Two nights' accommodation and meals	\$250	\$300	\$350
Subtotals	\$610	\$800	\$1,200

We may have either one or two staff persons making the trip to Jackson and attending the meetings. We will start with Pam and Suzanne both attending in order to facilitate and document the process. Once we have the system working smoothly, we can coordinate with planning staff to help with parts of the meetings and partially reduce the amount of consultant time required.

**4. CAN YOU WORK WITH A SEPARATE COMMUNICATIONS ENTITY? IF NOT, WHY DO YOU BELIEVE THE SERVICES NEED TO BE PROVIDED BY ONE TEAM?**

Yes, we can work with a separate communications entity. A public relations group could enhance the citizen outreach effort including branding and marketing.

Design Workshop does have the specialized staff to provide communications services, including branding, marketing and website development. Having one team provide all the services could streamline the process, making it more cohesive, efficient and cost effective.

**5. ARE YOU AVAILABLE FOR A VIDEO CONFERENCE INTERVIEW ON 12/7/2010 BETWEEN 1:00PM AND 4:00PM?**

Yes, we will be available. Please advise us if you would prefer that we interview in person.

## GETTING TO THE FINISH LINE - OVERVIEW OF THE PROCESS

- Collaborate with planning staff
- Facilitate Town Council and County Commissioner meetings to complete document
- Obtain and reflect community consensus
- Prepare ongoing documentation of input

PC CERTIFIED COMPREHENSIVE PLAN UPDATE

September 6, 2010

COMPREHENSIVE PLAN ADOPTION PROCESS  
Mid to end 2011

### 1 CHECKING IN AND MOVING FORWARD

- With Staff, Council and Commission
- Have all been heard?
- Are ideas reflected?
- Identify areas of agreement
- Identify outstanding issues to resolve
- Formulate process for moving forward

### 2 FACILITATE COUNCIL AND COMMISSION PROCESS

- Series of topical meetings and worksessions
- Use facilitation tools to generate consensus
- Address public concerns
- Continual coordination with planning staff
- Document process and conclusions

### 3 COMMUNITY OUTREACH

- For Plan Refinement
- Reinforce and re-invigorate
- Community presentation
- Hold focus groups on specific issues
- Channel input at elected officials' meetings
- Keypad polling to confirm
- Online survey for last details

JACKSON AND TETON COUNTY COMPREHENSIVE PLAN

# PROCESS DIAGRAM

Illustrating types and sequence of meetings with elected officials and milestones for citizen input

