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## Weil & Associates Facilitation Services

### Response to Questions

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## FACILITATION STYLE

*What is your facilitation style?*

#### **General Philosophy**

Our general facilitation philosophy applies an adaptive facilitation approach to every situation. Adaptation begins with a thorough situation assessment in which we look carefully at the desired outcomes of the participants and their roles, the decisions to be made, areas of agreement and issues to be resolved, the time available, and the broader context of the decisions. This approach is particularly important when we join a decision process after extensive work has been completed and expectations and positions are already well established. Once we have a solid understanding of the starting point, the decision process is driven by four facilitation principles for finding the highest value solutions to complex decisions.

We understand the Comprehensive Plan's history to date of three years of public discussion and community input. It is not our intention to re-do or revisit the past, but to move the process forward in the most constructive and efficient manner possible. This perspective will be incorporated into our thinking during the process steps mentioned below.

#### **Facilitation Principles**

**Define a Clear Decision Roadmap** – Every facilitation, particularly among elected officials, is a sequence of decisions and agreements to achieve the overall desired outcomes. The visual roadmap of discussion topics and decisions allows all participants and the community to see how the discussion will proceed and what will be expected of them. The roadmap also allows us as facilitators to progressively build agreement among the group and identify when and where there are barriers at each step. The Comprehensive Plan discussion provides a perfect example for the need for a decision roadmap. The Plan contains several major chapters organized in “themes” that must be discussed in a logical progression; however the sequential movement through the Plan chapters in their numerical sequential order may not be the most productive approach. A hierarchy of policy questions that begins with the broadest questions and progresses to the specific may be a more logical decision roadmap.

**Build on Areas of Agreement** – In discussions about controversial issues it is easy to focus on the differences and disagreements. Our approach begins by identifying the areas of agreement and seeks ways to expand on these agreements. Facilitating from the points of agreement creates a positive sense of accomplishment in the group and helps demonstrate relationship dynamics and processes that lead to further agreements. For example, a general agreement may exist on the best land use pattern for Teton County and the Town of Jackson but differences of opinion may arise in the detailed methods to achieve the pattern. Understanding the reasons for the broad agreement is an important step to resolving the more specific differences.

**Provide Objective Analysis to Support Decision-making** – Objective, factual information helps groups to correctly understand the issues and tradeoffs and avoid decisions that are based on perceptions and anecdotal information. Our team members in conjunction with town/county staff will bring reliable information to the discussion and help participants understand the issues and make decisions from a fully informed position. In the Comprehensive Plan discussions, for example, a certain amount of development may occur irrespective of Plan policies and goals because of many platted vacant lots. Factual information on the potential for the Plan to affect future development, and where this potential may be limited, is an example of objective information that will support effective decision making.

**Create Space for Creative Solutions** – The meeting process and facilitation techniques are designed to create a safe space for participants to explore creative ideas and talk openly about the issues in search of ways to reach agreement. In some instances this may mean interrupting discussions focused on conflict and in others, it may call for creative exercises to expand the options. Our process will focus on creating safety for participants to talk creatively and freely about issues. Understanding all viewpoints, whether they are discussing workforce housing goals, South Park development or town infill and redevelopment, is important for the participants to reach the most successful decisions.

Within this general framework, we manage the process and people to maximize progress and results. Specifically, we work with the group to ensure that everyone is focused and attentive on the topic at hand – stressing clear agendas and meeting purpose, and eliminating distractions. During the discussion, we focus on the dynamics of the group – managing the dominant participants and drawing out hidden ideas and viewpoints. We do this by following a simple series of steps for each topic: 1) “open” – frame the issue and gather information, 2) “narrow” – organize the information and focus the discussion, and 3) “close” – select the best approach and reach agreement. This approach ensures that we hear from everyone and guides discussion from a clear beginning to a successful completion. For each meeting and for the overall process, we also pay particular attention to managing the information to and from the group, ensuring accurate information at the right level of detail to support understanding and agreement.

## ***Effective strategies***

### ***Specific strategies you have used in the past?***

As noted above, our overall approach is adaptive facilitation that responds to the specific needs of the participants, agreed upon desired outcomes, and issues of each situation. Once we fully assess the situation, we develop the overall decision roadmap described above. The final specifics of this roadmap will be designed jointly with the client in order to be the most responsive to the needs of the town Council/County Commissioners and to best build on the work and public input that already have occurred. Meeting types and communication techniques will be designed to demonstrate transparency of the process and an understanding of previous community viewpoints expressed by citizens.

On the macro scale, the following are some of the strategies that have worked effectively in past projects.

**Mix of Meeting Types** – There are a variety of meeting types that can effectively support decision-making. One-on-one meetings effectively identify issues and opportunities from individual participants in a safe environment where participants can speak freely and confidentially. Facilitated meetings of the decision-makers are typically the core element of a decision process. Community forums can be used effectively to foster community understanding, agreement and support on particular topics.

**Issue Caucuses** – A particular type of meeting we have used effectively is issue caucuses. Issue caucuses include a subset of the larger group who receive a specific assignment from the group to discuss and recommend a solution to a challenging issue.

**Independent Polling** – When elected officials are hearing vocal concerns from a segment of the community, public opinion polling can help clarify the issues, concerns, and degree of support in the broader community. We recognize that significant polling has already occurred as part of the planning process and are not suggesting it be repeated.

With each meeting, there are a variety of tools and techniques to support consensus decision-making. The following are some of the effective techniques that may be valuable in this stage of decision-making for the Comprehensive Plan.

**Creative Brainstorming** – Issue-specific brainstorming can identify new ideas or approaches to a contentious issue.

**Values Priorities** – Independent polling of the group to identify and achieve group consensus on the relative priority of community values.

**Options/Alternatives Analysis** – Using an objective, quantifiable matrix to compare the benefits and risks of alternate strategies or approaches. The values priorities listed above can be used to weight evaluation factors.

## ***Initial Process Outline***

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

Three key factors shape the initial process design for the Jackson/Teton County Comprehensive Plan:

**Final Decision Stage** – The Comprehensive Plan process has been underway for three years and is now in the final decision stage. Therefore, the decision process needs to bring forward issues and information already identified, without reopening prior discussions or reinventing the wheel.

**Facilitating Elected Officials** – Joint meetings of the Town Council and the County Commission will be the core of the decision making process and will be the major focus of our team.

**Clearly Recognized Progress** – The decision process to date has been long and tedious. The final stage of the decision process must strike the right balance of prompt progress and considered deliberation of important issues.

With these three basic factors in mind, the following sequence of activities form the process outline or framework leading to final approval within six months. This outline is provided as an initial suggestion and the final process design will be determined in conjunction with the Council, Commission and staff.

- **Situation Assessment** – Review the Comprehensive Plan process and community input to date and conduct one-on-one interviews with Council members and Commissioners.
- **Selection and Prioritization of Key Issues and Agreements** – Work collaboratively with the joint Council/Commission to identify the priority issues for discussion and agreement and determine the most effective sequence of discussions
- **Agreements on Priority Issues** – Facilitate discussions of the joint Council/Commission to reach agreement on priority issues.
- **Final Public Comment** – Provide opportunity for public comment on the Comprehensive Plan and issue agreements at strategic milestones in the process and before approval votes.

- **Approvals** – Support approval actions by Town Council and County Commission.



The following are brief descriptions of the activities and meeting types that that we would use to plan and implement the facilitation process.

### **Situation Assessment (December and January)**

During the initial phase, we will review the current draft of the Comprehensive Plan and all supporting materials. From this review we will identify and synthesize the planning issues and summarize community viewpoints and concerns that have been expressed to date.

We will then conduct one-on-one interviews with the ten elected officials and two Planning Directors to identify each decision-makers' perspectives on the current draft Plan and key community issues, areas of agreement between the two elected bodies, and areas of concern regarding the current draft Comprehensive Plan. The outcome of these interviews will be used for collaboration and finalization of an efficient process design.

The information review and interview results will shape the basis of the decision process roadmap, which will define the sequence of topics for discussion and agreement leading to final approval of the Comprehensive Plan.

### **Joint Council/Commission Meetings (January to June)**

Joint meetings of the Town Council and County Commission will form the backbone of the decision process. Based on the results of the assessment phase, together with the Town and County elected officials and planning directors, we will finalize the sequence of discussions and decisions on key topics, which will be documented in a decision roadmap.

For each meeting, we will work with a designated member from the Town and County boards together with Town and County staff to prepare the agenda, assemble and present supporting information, and design discussion formats to air issues, identify approaches or options, and support interim decisions. We also will identify when and how public comment will be invited to ensure it is constructive and timely to the deliberation and decision process (see below for further discussion of incorporating citizen participation).

### **Issue-Specific Work Groups and Caucuses (As Needed)**

Along the way, specific issues may warrant assignment to a small working group to develop agreements and recommendations to resolve an issue or conflict. For example, refining and agreeing on the principles and policy actions to meet the community's Employee Housing needs may warrant a small group discussion that produces results for the full group to discuss. We will identify these issues as part of developing the decision process roadmap and as they arise during the discussions. Our role is to ensure that the joint group approves and charters the work activities of any issues-specific group in developing constructive recommendations to the full group.

Also, there may be instances where the Town Council or the County Commission wishes to meet independently of the joint group to discuss and refine their views on an issue or policy. We will support these efforts to the extent that they focus on constructive input to the decision process.

### **One-on-One Discussions (Between Meetings)**

The work between meetings with the Council members, County Commissioners, and staff is critical to the ongoing success of the decision process. Our work between meetings allows us to follow up on issues and perspectives from the joint meetings, identify options and alternatives to support agreement, and respond to questions participants may have on language, techniques, and procedures that will support progress (see below for further discussion of the importance of communications and writing in support of the facilitation process).

### **Community Workshops or Meetings (As Needed)**

We recognize that there has been extensive public comment throughout the planning process and that additional comment may not provide new information about public perspectives. However, there may be a topic or issue that the Council/Commission feels warrants an open, collaborative meeting where Council members, County Commissioners, and staff work side-by-side with community members to fashion an agreement. Council and Commission meetings are not structured in a way that is conducive to discussion and resolution of community issues – they are designed to receive public comment formally before elected official decisions. If an issue arises that the Council/Commission determines could be advanced through a collaborative community discussion, we are prepared to assist the Council/Commission and staff in making such a meeting a constructive component of the decision process.

### ***Incorporating Citizen Participation***

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

There are many tools that can be used for citizen participation. For this project, which has already gone through a lengthy public involvement process for the past three years, we expect a stronger focus on public information – transparency in the decision making process – rather than active public involvement. It is important that the community be informed about how, when and where decisions are being made. Not all community members rely on the same source for information, so a variety of communication tools are listed below.

Types of citizen participation tools to be considered for the Comprehensive Plan project:

**Acknowledge Previous Community Input** – As mentioned earlier, as a part of our initial Situation Assessment phase we will review and summarize community interests and concerns expressed during the earlier phase of this project. This information will be brought forward as a part of the decision-making process and publicly acknowledged throughout the process.

**Highly Utilize the Jackson Hole News & Guide** - We will work with a local graphic designer to create fun, attractive quarter page ads or newspaper inserts for the Jackson Hole News & Guide, to keep the Jackson community informed about the Comprehensive Plan decision-making process – an outline of “the roadmap”, meeting dates, issues to be addressed, opportunities for input, summary information, issue outcomes, and more. We would recommend that the same location in the paper be used for Comprehensive Plan related information throughout the process so that community members soon learn where they can turn to be updated on the project’s progress and activities.

**Continue Updating the Comprehensive Plan Website** – Some members of the community may prefer tracking the decision-making process through the Comprehensive Plan website. We will work with Town and County staff to ensure that this website remains up-to-date and links to it are

provided on the Town and County sites and on other websites around the community. The blog on the site may also be a useful tool for providing updates and perspectives for the community.

**Continue Opportunities of Public Comment through the Comprehensive Plan Website –**

Because the Town and County are at the final decision-making stage of this project, the public involvement for this stage will be more limited and different than the previous three years. It is important, however, that some avenue of communication remain open between the community and their elected officials. At a minimum, community members will be able to continue to express their interests and concerns by emailing comments via the project website. Whenever possible, we will frame issues and questions to focus public comment on the issues of greatest value in the final decision stage. These comments will be monitored and summarized by the team throughout the remaining phase of the project.

**Proactive Community Outreach –** When community input is needed on a particular subject we will not rely solely on newspaper advertising to get the community attendance that we need and want. As needed throughout the process, personal contact will be made with key stakeholders encouraging their participation in important relevant meetings or work sessions.

**Community Mailings –** Once the decision-making roadmap has been finalized we may consider a community-wide mailing that informs the entire community of the process ahead.

**Informational Community Presentations –** Another avenue for informing the community is through presentations to community groups such as the Chamber of Commerce, the Rotary Clubs, the Jackson Hole Conservation Alliance, and others. Presentations would be considered at the start and at the finish of the process.

**“Citizens’ Guide” –** Upon final adoption of the Plan, a Citizens’ Guide will be developed so that the community will better understand its content and the next stages for implementation, including the process for developing the land use maps. “Citizen Guides” which successfully make a complex document accessible to understand by all is greatly appreciated by the larger community.

## SEPARATING FACILITATION & COMMUNICATIONS SERVICES

*Can we provide solely facilitation services?*

Yes, we can provide solely facilitation services, however we believe that the type of decision process support you are requesting requires an integrated team of facilitation, communications, and writing support. The communications, messaging and writing that follows from and supports the facilitation is a critical component of fostering agreement, acceptance, and support, particularly among elected officials. For example, the tone, style, and messaging when summarizing and addressing community concerns is an important part of building community understanding of the issues and decisions facing decision-makers. This community understanding ultimately determines the flexibility for elected officials to make tough decisions in the long-term interest of the entire community. Our team is uniquely skilled at helping elected officials and other decision-makers communicate the issues, process, and decisions in a way that builds community acceptance.

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

If we are providing solely facilitation services, our facilitation team would be Charles Gardiner and Linda Weil. We believe a tag team approach to facilitation maximizes success by allowing us to pay attention to and manage the myriad elements of a group discussion – information, relationships, behaviors, conflicts, and agreements. In this case, the tag team provides the additional benefit of a

local facilitation resource in Jackson to follow up on key issues, prepare participants for meetings, and, if necessary, support a meeting on short notice.

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

Charles and Linda would work together to plan and support all of the meetings in the decision process. We expect to work closely with Town and County staff as subject matter experts and to support meeting logistics and operational issues. Bill Collins is a supporting member of our team and brings significant knowledge of the community, planning issues, and the Comprehensive Plan process to date.

## RATES AND AVAILABILITY

*What are your rates and availability (January 2010 to July 2010 with possible extensions) to attend meetings in Jackson including travel and all meeting preparation and summary?*

### ***Hourly Rates***

Charles Gardiner	Lead Facilitator, Mtg. Prep	\$160/hour
Linda Weil	Facilitator, Mtg. Prep	\$140/hour
Bill Collins	Mtg. Prep, Writing/Editing as needed	\$140/hour

The costs listed below are preliminary and will be adjusted, as needed, after finalizing the Scope of Work with the client.

### ***Individual Meeting***

#### **Assumptions**

Half day meeting of the joint Council/Commission

Planning and preparation with one representative each from the Council and Commission and with Town and County staff (agenda, outcomes, format, supporting information)

Collection of supporting planning/technical information and meeting logistics (facility scheduling, setup, notification) provided by Town and County staff

#### **Costs**

Consultant Fees:	\$5,360
Travel/Food/Lodging 2 days	\$ 755
Total:	\$6,115

### ***Multi-day Meetings***

#### **Assumptions**

Two 4 to 6 hour meetings of the joint Council/Commission on consecutive days

Planning and preparation with one representative each from the Council and Commission and with Town and County staff (agenda, outcomes, format, supporting information)

Collection of supporting planning/technical information and meeting logistics (facility scheduling, setup, notification) provided by Town and County staff

### Costs

Consultant Fees:	\$9,600
Travel/Food/Lodging for 3 days:	\$ 895
Total:	\$10,495

## WORKING WITH A SEPARATE COMMUNICATIONS TEAM

*Can you work with a separate communications entity? If not, why do you believe the services need to be provided by one team?*

Our facilitators are able to work with a separate communications entity however, as mentioned earlier, we believe that the type of decision process support you are requesting requires an integrated team of facilitation, communications, and writing support by a single team that understands each others' skills and is already on the same page regarding project philosophy and approach. The community outreach, public information, messaging and writing that follows from and supports the facilitation work is a critical component of clear communication from the joint Council/Commission and each individual elected official. This clarity aligns the community with the decision-making process, fosters greater community support and understanding, and creates more flexibility for decision-makers and broader support of outcomes.

## INTERVIEW AVAILABILITY

*Are you available for a video conference interview on 12/7/2010 between 1:00pm and 4:00pm?*

Linda Weil is available to attend in person. Charles Gardiner can be patched in by conference call or video conference after 2:00 p.m.

## ADVANTAGES OF A LOCAL TEAM

Weil & Associates offers depth and breadth in facilitation, decision-process design, communications and planning expertise. And two of our three team members are local and have deep knowledge of local issues, land use planning, and the Comprehensive Plan process to date. Local presence also means greater cost effectiveness in many ways:

- More Town and County funds will be used for direct Facilitation Services rather than travel, food and lodging expenses for all members of a team.
- Greater flexibility by having a local facilitator available for additional wrap-up or follow-up meetings without an additional large expense.
- Most of the team being local enhances communication before and after meetings.
- Most of the team being local means less pressure on Town and County staff to handle all the various details and logistics of planning for and conducting meetings and workshops.

- Our local team members – Linda Weil and Bill Collins – have diverse skills, creating the opportunity to accommodate any unanticipated needs that may arise during the process.
- Our graphic design work will be done by one of Jackson's finest graphic design businesses.