



Midpeninsula Regional
Open Space District

R-13-10
Meeting 13-02
January 15, 2013

AGENDA ITEM 1

AGENDA ITEM

Consider Endorsing the Vision Planning Process, including the Communication, Engagement, and Public Participation Plan

GENERAL MANAGER'S RECOMMENDATION

A handwritten signature in black ink, appearing to be "S. J. J.", written over the end of the "GENERAL MANAGER'S RECOMMENDATION" header.

Discuss, provide input to staff, and endorse the proposed Vision Planning process and the associated Communication, Engagement, and Public Participation Plan (CEPP).

SUMMARY

The Midpeninsula Regional Open Space District (District) is embarking on an exciting new project to establish, with partner and public feedback, a District-wide vision for land preservation, resource management, public recreation, and working lands. The vision planning process will ensure consistency with the District's mission, utilize the most current scientific data and planning analysis, and reflect the priorities and values of the Board and public. The Vision Plan will allow the District to (1) prioritize future land conservation, stewardship, public access, and land management decisions so as to achieve the greatest benefit given limited resources, (2) leverage support for new funding sources, including a future capital finance program, and (3) engage the public in the District's work to a greater degree. The Vision Plan will guide the District for the next ten to fifteen years and ensure that current and future staff and funding resources are being targeted to those activities that are of highest value and provide the greatest public benefit. The Vision Plan will also serve as an update to the District's 1998 Regional Open Space Study and 1992 Master Plan, fulfilling the San Mateo County LAFCo condition of approval for the 2004 Coastal Protection Program.

Vision Plan development provides an excellent opportunity to engage and inspire the public served by the District, both by providing information about the District and by involving the community in the creation of a shared vision for the future of the District and the region's open space. A five-phase public engagement effort will be seamlessly integrated with the overall planning process, reaching out to an ever broadening circle of media, partners and stakeholders. A Community Advisory Group (CAG) will be formed and is expected to play an important role in shaping the vision by facilitating, reviewing, and interpreting public input.

The project is on an aggressive timeline and is scheduled for completion in April 2014, spanning two fiscal years. The Fiscal Year (FY) 2012-13 Planning Department budget includes \$300,000 for the Vision Plan project. To date \$60,739 has been expended. Upon Board endorsement, anticipated additional FY 2012-13 expenditures would total \$120,900, leaving \$118,361 unspent for this fiscal year. For FY 2013-14, the estimated budget would be \$610,900.

As part of the FY 2013-14 Action Plan development, staff has estimated the level of District non-field staff involvement needed to implement the proposed Vision Plan at approximately 10% (equivalent to about 6 full-time employees). Assuming that all non-field vacant positions are filled, staff has concluded that no new permanent staff positions would be needed to undertake the Vision Plan. Instead, staff would be reassigned from other District and Department projects and additional capacity needs covered through an increase in intern hours or outside contract services.

DISCUSSION

Background

The District actively preserves a regional greenbelt of open space land, protects the natural environment, and provides opportunities for public recreation and environmental education for the San Francisco Peninsula and South Bay, as well as the broader Bay Area region. The District, like many other agencies, is experiencing staffing and funding constraints that limit its ability to further its mission. To address these challenges, the District’s Strategic Plan calls for an Open Space Vision Plan that will: 1) prioritize lands and activities within District boundaries for conservation, public access, landscape restoration, and agriculture, to maximize the beneficial impact given the available resources; 2) enhance regional collaboration to leverage the strengths of other conservation and partner organizations; 3) build public support to create a common vision; and 4) generate wide support for future funding efforts to enhance financial and staffing resources to successfully create greater balance between the three parts of the District’s mission.

As presented to the Board at the October 10, 2012 meeting (see R-12-100), the Vision Plan will utilize a community value-based planning process that integrates public values and knowledge with scientific data and expertise. The approach will benefit the District by:

- Enhancing our visibility and overall organizational sustainability
- Building alignment between the District, its partners, and surrounding communities
- Creating an informed public, who knows what the District does and feels part of it
- Defining those priorities that have the greatest public support

Vision Plan Components

The Vision Plan document will identify a suite of high-priority areas and actions as well as goal-oriented action selection criteria that reflect both the District’s mission and community values. Inspirational imagery and compelling information that demonstrate the importance of the District’s work on the Peninsula will be infused throughout the document.

The Vision Plan will include the following four major components, which are defined below and further described in Attachment 1:

Major components of the Vision Plan document	What it consists of
Open Space Goals	Goals that reflect the District’s mission and community values. Example: Protect rare species

Action Selection Criteria	Guidelines for decision making that assist in the selection of Priority Actions, and later offer a way to measure progress towards achieving the Open Space Goals. Example: Preserve land within large intact habitat patches
Priority Area Maps	Maps and GIS data displaying areas of high open space values. Example: A map displaying areas of high biodiversity
Priority Actions	Subarea-specific priority actions for land protection, land stewardship, and ecologically sensitive public access and education on the Peninsula. Forms the basis and structure for the Capital Funding Program. Example: Control sediment within the San Gregorio Creek Watershed

Each Vision Plan component will be organized into the following themes, and reflect the District's Mission and public values (themes may be refined as part of the planning process):

- Healthy Plants, Animals, and Watersheds
- Locally Sustainable Working Lands (cultivated lands, grazing, and restoration forestry)
- Low Intensity Recreation, Health, Access to Conserved Lands, and Environmental Education
- Beauty, Scenery, Rural Character, and Cultural Resources

The Vision Plan will evaluate lands within District boundaries with each of these open space themes in mind, and identify the best places to accomplish the Open Space Goals. The Plan will feature succinct text, tables, and maps that highlight key aspects of each theme, including geographic distribution and factors influencing the sustainability (i.e. threats) of each theme. As a result of this work, the District will gain:

1. A more robust GIS database and decision support tool to assist with future project selection
2. Detailed memo characterizing lands within District boundaries according to the Open Space Themes
3. Enhanced coordination with our partners and the larger community to expand our resource network to facilitate future collaborative work

Vision Plan Process and Timeline

The Vision Plan process consists of five phases of public engagement represented by the acronym SHEDD: Getting Started, Hearing the voices, Enriching the conversation, Deliberating, and Deciding. The attached CEPP describes these phases in further detail (see Attachment 2). The scientific data analysis and planning work will be seamlessly integrated into each SHEDD phase, as summarized below. The Community Advisory Group (CAG) is expected to play an important role beginning with Phase 2.

Phase 1: Getting Started (July 2012 – January 2013)

The Getting Started phase is largely complete, and has consisted of selecting and hiring two lead consultants (Public Dialogue Consortium (PDC) and Jodi McGraw Consulting) to: 1) refine the project scope of work, 2) define the integrated team of consultants needed to support the project, 3) develop the CEPP that will guide the outreach efforts, and 4) obtain Board input on and endorsement of the proposed planning process.

Staff has worked closely with the two lead consultants to refine the vision planning process that is presented in this report. Jodi McGraw Consulting is leading the planning and analysis portion of the Vision Plan, while PDC is leading the public outreach aspects. Based upon Board input, staff made a concerted effort to reduce the number of meetings, streamline the Vision Plan process, and utilize staff resources efficiently. This report and attachments represent the Phase 1 deliverable, and the task of forming the CAG will conclude Phase 1.

Phase 2: Hearing the Voices (January – May 2013)

This phase is focused on building new relationships, and broadly eliciting aspirational voices to understand the public's values and vision for the future of open space in the District. This phase will incorporate a series of Community Conversations that will begin with the inner circle consisting of the District Board, CAG, and other close partners, and spread outward to an ever broadening network through a structured series of small, informal interviews. Trained student interns and potentially District volunteers will conduct the Community Conversations, documenting the general tenor of the conversation as well as inspirational quotes. Baseline polling research will inform the interview topics. As requested by the Board, interviews will strike the appropriate balance between allowing participants to imagine the future while also being grounded in the District's mission and the general Vision Plan themes. This phase will also involve new tools and materials for initiating broad public outreach and engagement, through media, email, and social networking. Further information about the CAG can be found in the November 28, 2012 Board Report (see R-12-119).

As the Community Conversations occur, the foundational planning and analysis steps will begin. During this phase, the Planning Team will synthesize and evaluate existing information, and fill any essential data gaps. The Planning Team will prepare a brief report that characterizes lands within District boundaries according to the open space themes plus any additional themes that emerge from the community conversations. This report will inform development of initial Open Space Goals, and ultimately assist in the identification of priority areas and actions.

Four CAG meetings (two of which are preserve tours) and two Board meetings will occur during this phase. The final results will be:

- Initial list of Vision Plan themes (see page 3 for examples)
- Initial list of Open Space Goals
- Detailed memo that characterizes lands within District boundaries

Phase 3: Enriching the Conversation (June – September 2013)

The Enriching the Conversation phase of the CEPP is focused on enhancing, clarifying, and expressing the District's perspective, and synthesizing public input to shape the major Vision Plan components (i.e. open space themes, goals, action selection criteria, and priority actions). The enrichment aspect includes educating the public about the District, reflecting back what was previously heard, obtaining feedback on topics of primary importance to the District, and enhancing the understanding of open space as part of quality of life.

Once open space themes and goals are finalized, the development of Action Selection Criteria will begin. The Criteria will consist of decision making guidelines that will be used to select the Priority Actions in the next phase, and will later measure the progress on achieving the Open Space Goals. The CAG will be closely involved in developing the Criteria.

Once the Criteria are finalized, the planning and analysis team will integrate community input and other available information to create spatial data layers that depict the various open space

values, and otherwise illustrate the Vision Plan themes and Open Space Goals via Priority Area Maps, which will be used to identify Priority Areas and Actions in the next phase.

The planning and analysis team will then determine the potential actions that could be undertaken by the District and its partners to accomplish the Open Space Goals. The Criteria, Priority Area Maps, and consultants and staff knowledge will be used to create the initial set of potential actions.

Three CAG meetings (one of which is a preserve tour) and one Board meeting will occur during this phase. The final results will be:

- Full list of Vision Plan themes
- Full list of Open Space Goals and values
- Full List of Action Selection Criteria
- Priority Area Maps
- Draft list of potential actions

Phase 4: Deliberating (October – December 2013)

The Deliberating phase involves assessing and prioritizing the information developed throughout the Vision Plan process so far. This phase will address a challenging, but critical, question: What actions are most important to accomplish the Goals, given limited resources and competing interests? By establishing Priority Actions, rather than identifying specific projects, the District will retain flexibility in its annual work planning. Those Priority Actions that are beyond the District's current means could become the basis for a District Capital Finance Program, if so desired.

The public will be invited to attend one of three large meetings spread throughout the District as well as participate online to learn about how prioritizing different open space goals can affect Priority Actions. They will consider possible outcomes and priorities, and then rank their relative importance.

One CAG meeting, three large public meetings, and one Board meeting will occur during this phase. The final results will be:

- Prioritized List of Open Space Goals
- List of Priority Actions

Phase 5: Deciding (January – April 2014)

This final phase involves documenting the Vision Plan process as well as further synthesizing public input and technical data into a draft summary Vision Plan that can be circulated for feedback. After CAG and Board input is received and incorporated on the initial draft, a final wave of public outreach will occur to disseminate the first public draft of the Plan with feedback elicited via multiple ways. The project team will incorporate public input and move the Vision Plan document to final Board approval.

This phase includes two CAG meetings and two Board meetings. The final results will be:

- Summary Vision Plan document with the final Priority Actions
- GIS Database

FISCAL IMPACT**Consultant Services**

With the proposed consultant services to complete Phases 2 through 5 of the Vision Plan process (discussed further in Agenda Items 2 and 3 at tonight's meeting, see R-13-08 and R-13-09), the total consultant services costs to complete the Vision Plan process as outlined above would be as follows:

Public Dialogue Consortium

Phase 1 (FY12-13)	\$25,000
Phases 2 through 5 (FY12-13 and 13-14)	\$180,000
10% Contingency (FY12-13 and 13-14)	\$18,000
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Not-to-Exceed Total Amount:	\$223,000

Jodi McGraw Consulting

Phase 1 (FY12-13)	\$35,739
Phases 2 through 5 (FY12-13 and 13-14)	\$301,178
10% Contingency (FY12-13 and 13-14)	\$30,117
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Not-to-Exceed Total Amount:	\$367,034

District Staffing and Direct Costs

As part of the FY 2013-14 Action Plan development, staff has estimated the level of District non-field staff involvement needed to implement the proposed Vision Plan at approximately 10% (equivalent to about 6 full-time employees). Assuming that all non-field vacant positions are filled, staff has concluded that no new staff positions would be needed to undertake the Vision Plan. Instead, staff would be reassigned from other District and Department projects and additional capacity needs covered through an increase in intern hours or outside contract services.

The following table describes the approximate level of Vision Plan support expected by department:

<i>Department</i>	<i>Total Hours</i>	<i>% Time*</i>	<i>Equiv. Staff**</i>
Administration:	218	1%	0.1 FTE
Controller:	29	0.25%	0.05 FTE
General Counsel:	43	1%	0.02 FTE
Natural Resources:	1076	6%	0.5 FTE
Office of the General Manager:	890	11%	0.4 FTE
Operations (Management staff only):	518	4%	0.23 FTE
Planning:	4044	19%	2.0 FTE
Public Affairs:	3667	16%	1.6 FTE
Real Property:	2122	20%	1.0 FTE
TOTAL	12,607		5.9 FTE

* % Time = Total percentage of time for the entire department; is a factor of the total number of full time employees in each department

**FTE = Full time employee

Two lead staff from the Planning and Real Property Departments would devote a substantial portion of their time to the Vision Plan project, taking them away from normal assignments and requiring a reduced Department workload. To avoid an adverse impact on other District key projects, staff recommends temporarily backfilling these two employees during FY13-14 by

increasing GIS Intern hours in the Planning Department, and providing for potential contract staff (i.e. outside contract services) in the Real Property Department. The cost of temporary backfilling is shown row 3 in the table below.

District Budget

The Vision Plan will span several fiscal years. Taking consultant costs, direct costs, and the cost of temporary employee backfilling into account, the cost implications by fiscal year of the Vision Plan as outlined in this report are shown in the following table:

	FY12-13 Expenditures To Date	Remaining FY12- 13 Budget Expenditures	Estimated FY13-14 Budget	TOTAL
Consultant Costs				
Public Dialogue Consortium	\$25,000	\$46,000	\$152,000	\$223,000
Jodi McGraw Consulting	\$35,739	\$48,400.00	\$282,900	\$367,039
Direct Costs				
Online Public Engagement (Mindmixer)		\$10,000	\$10,000	\$20,000
Graphic Design		\$2,500	\$2,500	\$5,000
Mailing		\$6,000	\$10,000	\$16,000
Meetings		\$3,000	\$17,000	\$20,000
Document Printing			\$6,500	\$6,500
Map Printing		\$200	\$1,000	\$1,200
Employee Backfill				
Planning Intern		\$4,800	\$19,000	\$23,800
Contract Planner			\$110,000	\$110,000
TOTAL:	\$60, 739	\$120,900	\$610,900	\$792,539

The FY12-13 Planning Department budget includes \$300,000 for the Vision Plan project and is sufficient to cover the work anticipated to occur during the remainder of this fiscal year, as shown in the following table:

FY12-13 Vision Plan Approved Budget	\$300,000
FY12-13 Expenditures to Date	\$(60,739)
Anticipated Additional FY12-13 Expenditures	\$(120,900)
FY12-13 Budget To Remain Unspent	\$118,361

BOARD COMMITTEE REVIEW

No Board Committee review was needed for this item. The full Board continues to remain apprised of ongoing Project progress and next steps.

PUBLIC NOTICE

Notice was provided pursuant to the Brown Act. Notice was also sent to the interested parties list for this project.

CEQA COMPLIANCE

Endorsement of the Vision Plan planning process and the CEPP does not constitute a project under California Environmental Quality Act (CEQA), as it will not result in a direct physical change in the environment [CEQA Guidelines Section 15060(c)(2)].

NEXT STEPS

Upon Board endorsement and after incorporating Board input, staff will begin work on the Vision Plan as outlined. Initial efforts will include formation of the CAG, including Board ratification of the final list of participants.

Attachment(s)

1. Description of Vision Plan Components
2. Communication, Engagement, and Public Participation Plan

Responsible Department Head:

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Prepared by:

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Attachment 1. Description of Vision Plan Components

Major components of the Vision Plan document	What it consists of	How it will be developed	How it will guide District work
1. Open Space Goals	<p>Goals that reflect the District's mission and community values.</p> <p>Example: Protect rare species</p>	<p>Open space goals will be developed with the District Board of Directors (Board), Community Advisory Group (CAG), staff and public participation. Staff will draw upon District Policy during the creation of the goals. The public, CAG, and Board will prioritize the open space goals by evaluating the tradeoffs and implications of accomplishing each goal.</p>	<p>Assist in the selection of the Priority Actions</p>
2. Action Selection Criteria	<p>Guidelines for decision making that offer a way to measure progress towards achieving the Open Space Goals.</p> <p>Example: Preserve land within large intact habitat patches.</p>	<p>Action Selection Criteria will be developed with Board, CAG, staff and public participation. Staff will draw upon District Policy during the creation of the criteria. The public, CAG and Board will prioritize the criteria by evaluating the tradeoffs and implications.</p>	<p>Assist in the creation of the Priority Area Maps; Assist in the identification of Priority Actions; Guide future project selection and, over time, direct District resources towards the outcomes the public values the most.</p>
3. Priority Area Maps	<p>Maps and GIS data displaying areas of high open space values.</p> <p>Example: A map displaying areas of high biodiversity</p>	<p>GIS analysis/ scientific study; public participatory mapping</p>	<p>Assist in locating where projects should occur and in developing the Priority Actions</p>
4. Priority Actions	<p>Subarea-specific priority actions for land protection, land stewardship, and ecologically sensitive public access and education on the Peninsula.</p> <p>Examples: Control sediment in San Gregorio Creek Watershed; Provide additional family friendly recreation opportunities on the San Mateo Coastside</p>	<p>The prioritized open space goals, criteria, priority area maps and expert staff knowledge will be used to determine priority actions. Priority Actions will be refined during the public deliberation process.</p>	<p>These priority actions will guide the District's work over time and structure the Capital Funding Program to focus on the places that best accomplish the open space goals and achieve the highest valued outcomes. By establishing general, high-level priority actions, rather than identifying site-specific projects, the District will retain flexibility in its annual work planning.</p>

Open Space Vision Planning Process
Communication, Engagement & Public Participation Plan
December 2012



SPACE DISTRICT



Prepared in collaboration with the Public Dialogue Consortium

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Background

In 2011, the Midpeninsula Regional Open Space Planning District's (District) Strategic Plan called for the development of a Vision Plan to articulate the specific priorities, goals, and broadly-defined activities the District will undertake in the next 10 to 20 years. This Vision Plan will be consistent with the District's mission, utilize scientific data and analysis, and reflect the priorities and values of the public. It will allow the District to (1) prioritize future land conservation, stewardship, public access, and land management decisions so as to achieve the greatest benefit given limited resources, (2) leverage support for new funding sources, including a possible future funding measure, and (3) engage the public in the District's work to a greater degree.

The Open Space Vision Plan will be designed not only for the District, but also as a tool for local conservation partners to inform conservation choices and investments at a regional level. As such, the Vision Plan will promote inter-organization coordination, and will leverage private and public funds to accelerate the pace of, and maximize the impact on, land conservation, resource stewardship, and recreational access. The Vision Plan will be designed as an adaptive document to be updated as new information is collected and conditions or needs change. It will also serve as an update to the District's 1998 Regional Open Space Study and 1992 Master Plan.

The development of the MROSD Vision Plan provides an excellent opportunity to engage and inspire the public served by the District. It is an opportunity to provide information about the District and to integrate the community into the creation of a shared vision for the future of MROSD and the region's open space.

Purpose and Overview

The purpose of this document is to outline a Communication, Engagement, and Public Participation Plan (CEPP), an integral part of the overall Vision Planning effort. The CEPP will detail the actions the District would take to cultivate relationships with key stakeholders and the surrounding communities, educate and include the public in the activities and mission of MROSD, and increase support for the Vision Plan by incorporating public involvement throughout the life of the project, ensuring the transparency of the vision planning process.

The CEPP would enable collaborative public involvement that invites innovative ideas and articulates public values, priorities and recommendations, to inform and influence the final Vision Plan.

Meaningful, creative, and robust public involvement in the planning process requires strategies and activities designed to garner both broad and in-depth input and feedback to inform the final Vision Plan. The CEPP organizes these strategies and activities into a five-phase process represented by the acronym SHEDD: Getting **S**tarted, **H**earing the voices, **E**nriching the conversation, **D**eliberating, and **D**eciding. SHEDD is an approach to public dialogue work that the Public Dialogue Consortium (the District's consultant) has effectively used to enable diverse communities and organizations to engage in productive communication that leads to meaningful action.

Critical to the development and effective implementation of the CEPP is its seamless integration with the overall planning process. Each CEPP phase aligns with a corresponding Planning Team work plan phase. Outreach and planning are integrated to form a vision planning process that integrates public values and knowledge with scientific data and expertise. (See Appendix B)

The five CEPP phases are described below, followed by a description of the three outreach methods that would be implemented throughout all phases.

Five Phases of Communication, Engagement, and Public Participation

The CEPP phases are sequential, however, they do not have clear and distinct boundaries; rather, the phases overlap and flow together. The description below shows the sequence and timing of the CEPP in the planning process and outlines the focus of each phase, and the types of activities involved.

Summary Table: Five Phases of the CEPP

Phases	What it consists of	How it Supports Vision Plan
Phase 1 Getting Started 9/12-1/13	Setting up outreach and engagement infrastructure, including a Community Advisory Group.	Creates conditions for engaging stakeholders and public in Vision Plan.
Phase 2 Hearing the Voices 1/13-5/13	Engaging stakeholders, including the public, in “community conversations” to learn what is most important to them in relation to open space.	Gathers public aspirations, values and preferred actions. Also increases public awareness of the District’s work and the Vision Planning Process.
Phase 3 Enriching the Conversation 6/13-9/13	Synthesizing public input, disseminating input from community conversations, and providing information to enhance public knowledge about the District’s work.	Produces draft Open Space Goals, Action Selection Criteria, and potential Priority Actions informed by public aspirations and values.
Phase 4 Deliberating 10/13-12/13	Public deliberating on question: What actions are most important to accomplishing goals, given limited resources and competing interests?	Produces a list of Priority Actions and Priority Areas based on broad public input.
Phase 5 Deciding 1/14-4/14	Drafting, disseminating for feedback, revising and finalizing a Vision Plan document.	Results in a Vision Plan that reflects public and partner input, and is Board approved.

Phase One: Getting Started

September 2012 – January 2013

The initial planning phase has already started, and is focused on creating the optimal conditions for engagement by building the infrastructure and capacity that is critical to gain the desired public and partner participation, and building high levels of support for the District Vision Plan and the District itself.

This capacity-building work began with the internal conversations and processes that led to an initial short-term contract with the Public Dialogue Consortium (PDC). As part of this initial effort, the team held several workshops with the District Board and staff.

The Getting Started phase will continue to engage the broader public as the District staff, supported by the PDC, sets up the infrastructure – including products, tools and procedures -- to enable the implementation of the three CEPP Approaches described below: Productive Partnerships, Broad Outreach, and Engagement. It requires on-going coordination between the District staff, the PDC, and the Planning Team, all of whom will meet regularly throughout the vision planning process.

Phase Two: Hearing the Voices

January – May 2013

This phase of the CEPP is focused on building new relationships and broadly eliciting aspirational voices to begin to understand the public's values and vision for the future of open space in the District. This phase involves reaching out to an ever broadening circle of partners and stakeholders who will be encouraged to work with the District throughout the Vision Planning Process. Some of these partners and stakeholders will be asked to participate in a Community Advisory Group (CAG) to advise the District Board and actively participate in shaping the process and the final product.

This phase is about hearing the values, visions and aspirations of diverse stakeholders, including the general public, through *Community Conversations*. These conversations will begin with the inner circle consisting of the District Board, Community Advisory Group and other close partners. A keystone tool for this phase of the CEPP will be the *Community Conversations protocol*. This protocol includes a simple introductory text and set of questions that will be used to structure and guide public input across a range of populations, contexts, and modalities using interviews, small group conversations and technology tools. As requested by the District Board, *Community Conversations* will strike the appropriate balance between allowing participants to imagine the future while also being grounded in the District's mission and the general themes of most interest to the District. The flexibility of the protocol will allow the District to invite the public into open-ended conversations about what is most important to them while providing the structure to focus and aggregate the many voices that will be heard. This phase also involves creating tools and materials for initiating broad public outreach and engagement through media, email, and social networking.

As the Hearing the Voices phase progresses, the Planning Team would work with the rest of the Project Team to review, interpret and utilize public input helping to inform the focus of their work. This *learn as we go* approach also enables the Project Team to adapt the Community Conversations protocol as needed to focus on gaps in the types of input that is being elicited or to provide clarification. This iterative process will likely overlap with the next phase of the CEPP, Enriching the Conversation.

Phase Three: Enriching the Conversation

June - September 2013

The Enriching the Conversation phase focuses on enhancing, clarifying and synthesizing public input to shape the Vision Plan, including the Open Space Goals, Action Selection Criteria, and Priority Actions. The CAG will play a pivotal role in this process and will have working sessions at the beginning and end of this phase. The enrichment aspect includes educating the public about the District, reflecting back what was previously heard, obtaining feedback on those topics of primary importance to the District, and enhancing

understanding of open space as part of quality of life. Depending on the clarity and breadth of public input provided thus far, targeted interviews and/or surveys via the web, phone, text messages and print media may be needed to successfully develop Open Space Goals and Action Selection Criteria; and to draft Priority Actions that meaningfully reflect diverse public perspectives.

This phase would incorporate close coordination between the Public Engagement Team members and the Planning Team members. This coordination will ensure that the Vision Plan reflects public values and is based on scientifically-sound analysis.

Phase Four: Deliberating

October – December 2013

The Deliberating phase will involve assessing and prioritizing the information developed throughout the Vision Plan process so far. This phase will address a challenging, but critical, question: *what actions are most important to accomplishing goals, given limited resources and competing interests?* Public deliberation brings people into conversations about the identified options so they can express their priorities while hearing and considering different trade-offs. In this phase, the public will be invited to attend one of at least three large meetings where they will learn about how prioritizing different open space goals can affect priority actions, work in small facilitated discussion groups, and use keypad voting technology to express their priorities.

In addition to the public meetings, the public will be invited to participate online in this phase of the Vision Planning Process. On a Mindmixer website, the public will have access to the same information that will be shared in meetings, comment on discussion boards, and express their priorities through a survey tool.

This phase also involves a second broad wave of public outreach efforts which will include working through the networks of the Community Advisory Group members and other partners; using the media, email, and social networking; and implementing community-focused public outreach activities.

Planning Team members will be active participants in this phase of the CEPP, which will utilize mapping tools developed by the team. Planning Team members will present data both face-to-face and online; and they will work with the rest of the team to interpret the output of the public deliberation. During the Deliberating phase, team members will also provide the planning expertise needed to produce the final Vision Plan document: a MROSD-focused decision-making tool that is thoroughly grounded in public values as well as scientific data and analysis.

Phase Five: Deciding

January 2014 – April 2014

The final phase of the CEPP, Deciding, involves first creating a draft Vision Plan that will document the Vision Plan process and synthesize public input and planning data. The draft will initially be circulated to all Vision Plan process participants. After the Community Advisory Group and the Board review the draft and the Project Team incorporates their input, it will be disseminated to the public and the District will elicit feedback using a range

of modalities. The Project Team will then incorporate public input and present the Vision Plan document for final Board approval.

Three Approaches to Communication, Engagement, and Public Participation

Three approaches to effective communication, engagement and public participation are woven together throughout all phases of the CEPP. They include:

- **Productive Partnerships**
Working through sustained relationships with individuals and organizations focused on the elements of the District's mission
- **Broad Public Outreach**
Reaching and engaging diverse populations in the Vision Planning process
- **Public Engagement and Input**
Utilizing various strategies and tools for involving diverse populations in the Vision Planning process

Similar to the phases, these approaches do not have hard boundaries; they intersect and build upon one another, forming a cohesive and comprehensive strategy.

Productive Partnerships: Working through sustained relationships with individuals and organizations focused on open space

The District's leaders know that its key partners are important to the delivery of its mission. The District's success in the future will depend, in part, upon its ability to collaborate and work creatively with its partners to leverage resources. The Vision Planning process provides an excellent opportunity to strengthen partnerships while tapping into the expertise, communication tools, and networks that partner organizations can contribute. Ultimately, the relevance and potential impact of the process and the final Vision Plan can increase significantly with each key partner that actively participates.

Involving Partners

The PDC will work with the District staff to invite partner organizations to participate in the Vision Planning Process. Partners may choose to participate by:

- Referring individuals and/or assisting with introductions for Vision Planning process Community Conversation interviews.
- Hosting a small group Vision Planning process Community Conversation.
- Receiving partner-targeted email updates as well as general newsletters. These would include press releases and specific requests for input.
- Incorporating information and invitations to engage into their newsletters, listservs, and/or blogs.
- Disseminating targeted surveys.
- Hosting a large public meeting during the Deliberating phase of the Vision Planning process.

- Sponsoring snacks or facilitating outreach meetings or Community Conversations.

Community Advisory Group (CAG)

As discussed under the description of the Hearing the Voices CEPP phase, some partners and stakeholders will be invited to serve as members of the Community Advisory Group, which is a key strategy in the Productive Partnerships approach. The 20 to 25 selected representatives will be asked to participate for the duration of the Vision Planning process to provide advice, articulate their visions, goals and objectives, and to provide referrals and introductions to other leaders and potential participants. The goal is to build sustained relationships with individuals and organizations that continue after the Vision Planning process to support ongoing collaboration with the District. This subject is further discussed in the MROSD November 28, 2012 Board Report.

Broad Public Outreach: Reaching and engaging diverse populations in the Vision Planning process

Communications messaging and materials for broad public outreach will be developed and utilized throughout the Vision Planning process. Outreach efforts will be designed to 1) educate the public about the Vision Planning process and MROSD, 2) invite the public to provide input, and 3) to receive and respond to public inquiries.

The use of communication tools and technologies described below will be coordinated to form a comprehensive plan for broad, consistent public outreach. Materials will be tailored to reach specific populations and translated as needed. Relevant planning and scientific data will be incorporated into outreach efforts using non-technical language and clear, thorough explanations using methods designed to elicit meaningful feedback.

Media & Publicity

Media relations are a key component of the Vision Planning process, and will be used to increase public awareness of, and support for, MROSD and its mission. The communications effort will focus on developing productive, active relationships with media outlets that will promote coverage through feature stories, editorials, op-ed pieces, news reports, and other District references. The entire Vision Planning process outreach effort will use a consistent approach to develop and reinforce key messages.

Timely, compelling story pitches will be developed to generate media interest throughout the Vision Planning process. These pitches will be tailored to target specific outlets and contacts, including online media, traditional media organizations such as community newspapers and other, population-specific content providers, supported by language translations as needed. A top ten list of priority media contacts will be identified as part of a broader effort that will include approximately 50 media contacts, building upon existing District media relationships.

Branding the Vision Planning Process

District staff will work collaboratively with the MROSD Board and the CAG to generate an inspirational, descriptive brand for the Vision Planning process. This distinct title will anchor public outreach materials and will be designed to capture attention and generate recognition.

Broad Public Outreach through Websites & Social Media Networks

The MROSD website (www.openspace.org) will be regularly updated to provide timely Vision Plan information and promote participation. It will include summary data, specific quotes, compelling stories, photos and videos as well as links to additional sources and options for engagement.

The MROSD website will also route visitors to a separate, interactive Vision Planning process-specific platform for online participation. This online platform will focus on inspiring meaningful public participation using maps and other information tools, surveys, questions to prompt public response; it will also provide opportunities to rank or vote on alternatives and to post ideas, comments or questions. The District is currently using MindMixer for this purpose, which is also expected to be employed for the Vision Planning process.

Social media networks – including Twitter, Facebook, blogs, LinkedIn, and Yelp -- will be integrated into the communication and outreach plan to enhance public relations, provide public education and outreach, encourage public engagement, and receive public input.

Newsletters/ListServes/Email Lists

Newsletters will be produced to 1) educate the public about the District and the Vision Planning process, 2) invite and inspire the public to participate in the Vision Planning process using interview questions, surveys, and maps, and 3) to inform the public of future activities and opportunities for participation.

Email (e.g. Mail Chimp) will be utilized to regularly update and invite the public to participate in MROSD activities during the Vision Planning process. Continuously expanding email and mailing lists and developing databases will be a priority throughout the Vision Planning process for online and hard-copy newsletter distribution. Monthly updates will be sent out via email. Newsletters, possibly distributed quarterly in conjunction with the District newsletter, will be mailed to those not on an email list. Partner organizations will be engaged and invited to share monthly newsletters (or portions of it) with their email lists, leveraging existing relationships and communication resources.

Print Materials

Hard-copy materials, including flyers, and posters will be developed and distributed at MROSD preserves as well as community events such as Farmers Markets and street faires. Flyers will also be disseminated through the Community Conversations interviews and meetings (see below) and through partner organizations.

Engagement and Participation: Utilizing various strategies and tools for involving diverse populations in the Vision Planning process

Engaging broad and in-depth public participation will require creative, focused effort throughout the Vision Planning process. Various methods will be employed to invite and inspire meaningful and useful public engagement, with a focus on gathering and synthesizing input and feedback from diverse populations.

Community Conversations Protocol

Community Conversations interview questions and small group conversations questions will be developed collaboratively for interviews and surveys with partners and diverse groups. The Community Conversations Protocol will include an introduction to MROSD activities, mission, and the Vision Planning process.

Concentric Circles Approach

As a top priority, the Vision Planning process will use a Concentric Circles networking approach to expand the number of participants, and to ensure access to diverse and critical populations. The Board, partners and the Community Advisory Group, as well as other participants, will be encouraged to provide connections and introductions with a range of individuals, community leaders and organizations that are representative of diverse populations. Trained, supported Outreach and Engagement Interns (see below) will interview referred individuals or small groups and request additional referrals to individuals and community-based organizations to encourage participation in the Vision Planning process.

Outreach & Engagement Interns

Student interns from San Jose State University and San Francisco State University will be selected, trained and supervised by PDC in the use of the Community Conversations Protocol to assist with relationship building, data collection, and documentation of partner/public input during the public engagement process. Interviewees will be selected through referrals and contacts identified through the Concentric Circles Approach. Interns will collect photos, video and public input and Vision Planning process information to use in media and social media channels.

Phone/Text Message Outreach

Voicemail and text messaging will be used to allow for participation by those who do not have access to web-based technology, and to provide an additional avenues for public input. Information about how to participate via text message and voice mail will be disseminated through print materials as well as other media and publicity channels.

Public Forums

Extensive public participation will be integral during the fourth CEPP phase, Deliberating, as described above on page 6. During this phase, the public will use the values-based Action Selection Criteria, developed using public input from Phase Two of the CEPP (see page 5), to prioritize Open Space Goals and rank Priority Actions. In three public forums, hosted in different locations within the District, the public will learn about how prioritizing different Open Space Goals can affect Priority Actions, work in small facilitated discussion groups, and use keypad voting technology to express their priorities.

Preserve Tours

As part of the Vision Planning process, the number Docent and staff guided tours of the MROSD preserves may be increased and the public outreach about the tours will be expanded. The MROSD Preserve Tours can offer an excellent opportunity to engage the public in brief conversations based on the Community Conversation Protocol and to encourage participation in the Vision Planning Process more broadly in addition to

educating the public about the work of the District. The District staff will also host three preserve tours for the CAG.

Strategies to Include Diverse Voices

Strategies for inviting diverse public voices into the vision planning conversation are desirable for educational purposes, and to elicit broad public participation and input. The “grassroots” efforts articulated below support the activities specified in the media and publicity section.

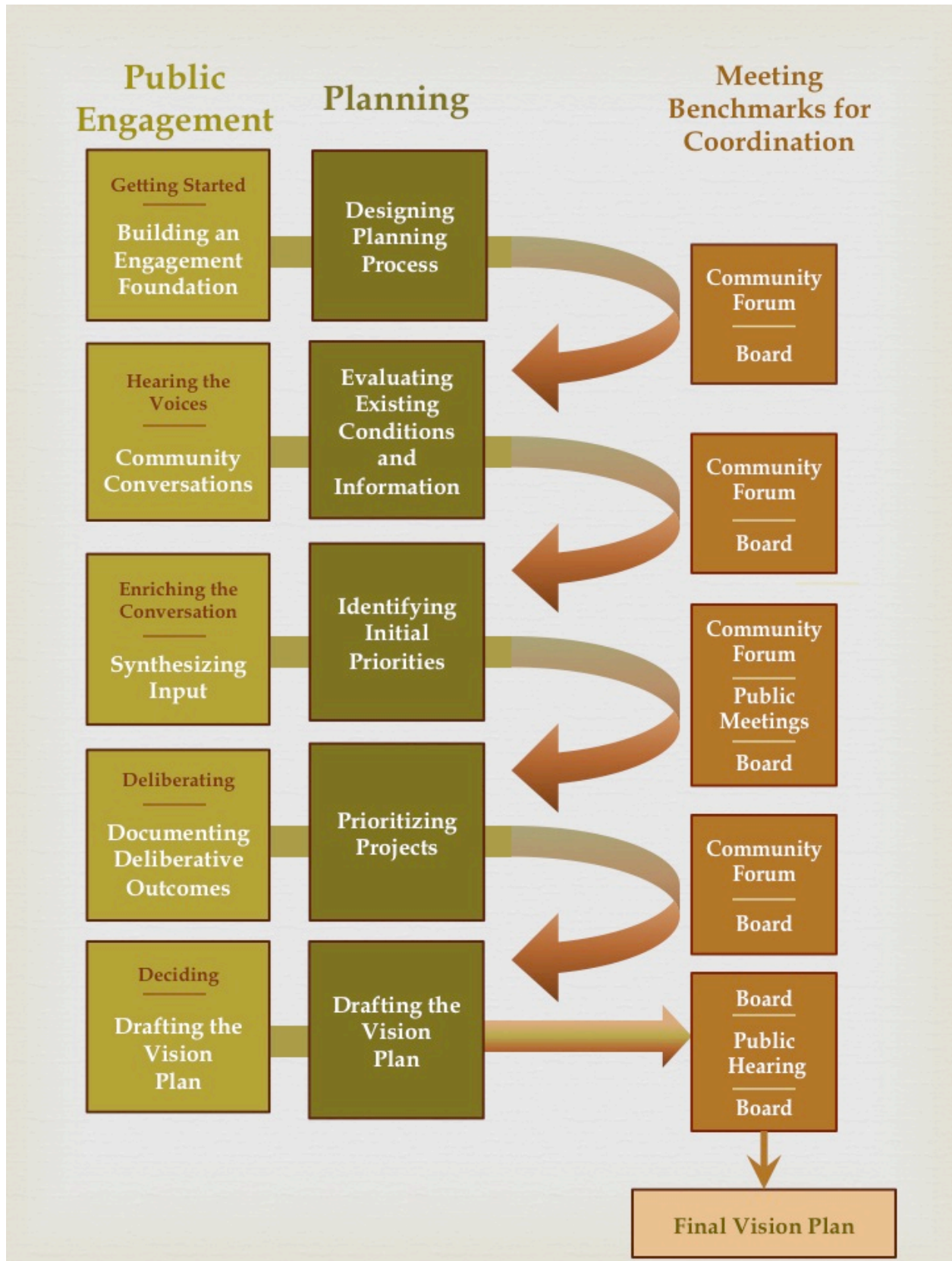
- Create handouts for preserve visitors (for example, 2nd graders visiting Deer Hollow Farm, other student groups and field trips, organized user groups, etc.) to take home and invite parent/family/friend participation and engagement through mail in surveys, websites, phone/text, and public forums.
- Identify non-open-space-related public places in the region to interview/survey individuals and build contact lists (for example libraries, community/cultural centers, school events, churches, outdoor shops & groups, retirement & independent living centers etc.).
- Identify regular community group meetings and methods to invite member participation.
- Identify community leaders who are willing and able to invite participation.

Board, Staff and Consultant Roles

It is important to clarify that this document articulates the District’s CEPP as a component of the entire planning process; the District Board will direct its implementation. The Board will meet at least once within each phase of the process to guide implementation, and the plan assumes that individual Board members will be involved in many CEPP activities, particularly the Community Advisory Group that will be formed as the CEPP is initiated.

The Public Dialogue Consortium has been selected to work with the District staff to assist in the development and implementation of the CEPP. The full Project Team includes the District staff, PDC, and Jodi McGraw Consulting. PDC will lead the public participation efforts as defined in the CEPP, and Jodi McGraw Consulting is leading the Planning Team. This document outlines how the work of the Planning Team integrates with the CEPP (see Appendix A). However, it does not explicitly define the role of the PDC as it is assumed here that PDC will be involved in assisting the District staff in all phases of the CEPP. A separate detailed work plan outlines specific PDC activities.

Appendix A: Diagram of Integrated Planning Phases



Appendix B: Summary Table of CEPP Activities

SHEDD	Partnerships	Outreach	Engagement	Core CEPP Implementation
Phase 1 Getting Started 9/12-1/13	<ul style="list-style-type: none"> Identify & clarify CAG Develop plan for partner communication. 	<ul style="list-style-type: none"> Branding and message development Research media targets 	<ul style="list-style-type: none"> Set-up Vision Planning process Technology Tools and Processes for Outreach and Engagement 	<ul style="list-style-type: none"> Project Team meeting schedule Coordination between CEPP & planning team.
Phase 2 Hearing the Voices 1/13-5/13	<ul style="list-style-type: none"> CAG Meetings: 2 meetings and 2 tours; referrals for engagement; advise on outreach; review technical & public input data. Work with partner organizations networks for outreach. 	<ul style="list-style-type: none"> Targeted Media Relations/Publicity Website/social network outreach Email newsletters (2) Flyers, posters, brochures 	<ul style="list-style-type: none"> Community Conversation protocol: Aspirations, Values, Priorities Train Student Interns. Conduct interviews, small group meetings, and technology-based Community Conversations 	<ul style="list-style-type: none"> Ongoing collaborative documentation & interpretation of Community Conversations input Board Study Sessions (3/13 & 5/13)
Phase 3 Enriching the Conversation 6/13-9/13	<ul style="list-style-type: none"> CAG Meetings (monthly) : 2 meetings and 1 tour; advise on Vision Plan goals and criteria based on public input and technical data; identify data gaps. Update Partner Communication Plan 	<ul style="list-style-type: none"> Update Media stories & messages incorporating Phase 2 public input. Website/social network outreach using public input from Phase 2. Email newsletter 	<ul style="list-style-type: none"> Online discussions around Phase 2 public input Targeted engagement to fill data gaps: interviews and surveys 	<ul style="list-style-type: none"> Merge public input & technical planning data to produce Vision Plan goals and criteria. Board Study Session (9/13) Develop materials and processes for deliberation phase.
Phase 4 Deliberating 10/13-12/13	<ul style="list-style-type: none"> CAG meeting (1): (10/13) Develop initial list of Priority Actions; Advise on tools and processes for public deliberation; advise on outreach for public meetings. 	<ul style="list-style-type: none"> Targeted Media Relations/Publicity Email newsletters (9/13; 12/13) Flyers and posters Work with Partner organizations networks for outreach efforts. 	<ul style="list-style-type: none"> Website deliberation tools with texting & voicemail options Large Public Deliberation Meetings (3 in 10-11/13) using small discussion groups and keypad voting. 	<ul style="list-style-type: none"> Merge public input and technical planning data Board Study Session (12/13)
Phase 5 Deciding 1/14-4/14	<ul style="list-style-type: none"> CAG meetings (1/14, 3/14): Advise on Vision Document and outreach for public input on drafts; advise on final drafts. Solicit Partner organization input on Vision Document 	<ul style="list-style-type: none"> Targeted Media Relations/Publicity Email newsletter (2/14) Disseminate draft vision plan via website & partner organizations 	<ul style="list-style-type: none"> Website, social media, texting and voice mail discussion of Vision Document. 	<ul style="list-style-type: none"> Iterative drafts of Vision Document influenced by public input. Board Public Hearings (2/14; 4/14)