

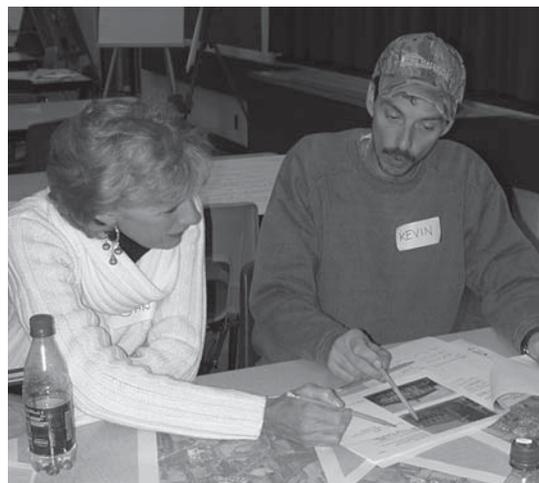
# CONTENTS

<b><u>Notebook</u></b>	2
<b><u>Supplemental Materials</u></b>	20
• <b>Vision Planning Diagram</b>	21
• <b>Conducting Effective Meetings</b>	22
• <b>Sample Press Release</b>	26
• <b>Vision Planning Poster</b>	27
• <b>Workshop Budgeting</b>	28
• <b>Workshop Checklist</b>	29
• <b>Community Newspaper Articles</b>	31
• <b>Facilitating Community Workshops</b>	33
• <b>Workshop Agenda (Example) - Watertown Outline</b>	35
• <b>Workshop Questionnaire</b>	36
• <b>Workshop Agenda &amp; Facilitation Notes (Red Creek)</b>	37

---

## New York State *Community Seminar Series*

# Vision for BOA



Governor David A. Paterson  
Secretary of State Lorraine A. Cortés-Vázquez  
Commissioner Pete Grannis, NYS Department of Environmental Conservation

New York State Department of Environmental Conservation,  
Division of Environmental Remediation  
New York State Department of State, Division of Coastal Resources  
SUNY ESF Center For Community Design Research



# VISION FOR BOA

## Purpose

This session provides an overview of the vision planning process and prepares the advisory committee to initiate vision planning as part of its BOA program. It discusses the leadership role of the advisory committee and consultant and presents strategies and steps that can be taken to encourage and maintain public participation in the BOA vision planning.

## Learning Outcomes

- Understand the significance of the vision plan in the BOA program
- Understand the vision planning process, the intent of the investigation and the component parts of the vision
- Appreciate the value of public participation and the importance of local leadership in facilitating this process
- Understand the characteristics of a successful vision planning process and the requirements of a successful vision
- Gain familiarity with the methods used to establish constructive dialogue
- Understand the need to ground the vision in local realities



## CONTENTS

*Presentation 1: Vision for BOA.....3*

*Presentation 2: Start Up & First Steps....4*

### *Worksheets:*

• *Identifying local stakeholder groups and resources.....7*

• *Reflecting on past experience.....8*

*Activity 1: Drafting an outreach strategy...9*

*Presentation 3: The Community Workshop Process .....11*

*Activity 2: Reviewing vision statements, goals and objectives .....13*

*Presentation 4: Refining the Vision.....15*

*Presentation 5: Outcomes of Vision Planning.....17*

### *Supplemental Material*

- *Vision Planning Diagram*
- *Conducting Effective Meetings*
- *Sample Press Release*
- *Poster Announcing Vision Planning*
- *Budget for Workshop*
- *Checklist for Workshop*
- *Newspaper Articles*
- *Facilitating Community Workshops*
- *Workshop Agenda*
- *Workshop Questionnaire*
- *Workshop Agenda with Facilitator Notes*

*Presentation Slide Handouts (provided at end of notebook)*



# PRESENTATION 1:

## Vision for BOA

### Introduction to BOA Vision Planning

Vision planning is a community-based planning process that brings stakeholders and community members together in a constructive forum where local understanding of issues and ideas can be shared and where consensus can be developed to describe a desired future. Through facilitated activities, community members, advisory committee members and consultants work together to understand and document issues and opportunities. With this understanding they are able to articulate a shared vision that describes the desired future and establishes goals and objectives to guide the attainment of the vision.

### Vision Planning and the BOA Process

In the BOA process, the vision plan is developed over the steps of the program. In BOA Step 1: Pre-Nomination Study, a community prepares an initial vision statement with goals and objectives and identifies possible redevelopment opportunities that will help the community accomplish its vision. In BOA Step 2: Nomination, the vision is further developed and refined based on the findings of the BOA inventory and analysis and the economic and market trends analysis.

### Characteristics of the Vision Process

Vision planning is a flexible process that is adapted to meet local circumstances. It is not formulaic, but does have a set of characteristics, including.

- Open and inclusive dialogue
- Conducted in facilitated public sessions
- Guided by local leadership (in the case of BOA planning, by the advisory committee)
- Employs methods of communication and documentation that are accessible to community residents
- Explores a full range of alternatives by which the vision can be accomplished

### Benefits of Vision Planning

- Informed by local knowledge
- Uncovers local issues and opportunities that might be overlooked by an outside consultant
- Facilitates the identification of valued local resources and guides decisions that make the best use of these resources
- Promotes community education and builds understanding of issues and choices
- Provides a positive and optimistic approach to addressing community issues
- Builds community support for planning recommendations and project implementation

## **PRESENTATION 2: Start up and First Steps**

### **A. BOA Vision Planning: Start Up**

Many of the activities in Step 1 BOA Start Up focus on organization and leadership development. They include:

- Project scoping – an initial meeting with all project participants and your DEC/DCR project manager
- Community training sessions that will help prepare you to carry out your work program
- Forming and organizing your advisory committee; and
- Selecting and hiring your consultants

### **The Importance of Leadership**

Vision planning requires thoughtful leadership and skilled facilitation. The advisory committee will play an important role guiding public outreach and participation in vision planning. The advisory committee will:

- Frame the process
- Determine and secure required assistance
- Facilitate participation
- Build partnerships and networks
- Manage the planning process

### **B. BOA Vision Planning: First Steps**

Following Start Up, the First Steps include:

- Conducting initial meetings with consultants and project partners
- Reviewing existing plans
- Developing an outreach plan/strategy to involve the public in the process
- Beginning initial preparation for the workshops

### **C. BOA Vision Planning: Workshops**

The workshops are the heart of the BOA vision planning process. Organization and preparation for the workshops will include:

- Implementation of the outreach strategy
- Development of a workshop agenda and activities
- Coordination and facilitation of workshops
- Drafting and disseminating a summary of the findings
- Drafting a vision

### **Keys to Successful Community Participation**

- Plan for broad community participation
- Provide the opportunity for meaningful contributions
- Make the process transparent
- Establish clear communication

- Provide effective facilitation
- Allow two-way communication
- Provide the opportunity for follow-up

### **Importance of Outreach and Communication**

Outreach will be very important to the success of your vision planning; without participation you will not be able to achieve the full benefits of the vision planning process. Make the first steps easy. Consider the following outreach techniques:

- Use posters and displays at libraries, fairs and community events
- Have advisory committee members speak at local meetings of local civic groups to , explain the importance of their participation
- Integrate vision planning activities into regularly scheduled community meetings and events.

### **Importance of a Reasonable Schedule**

Careful scheduling of the workshops is important to avoid conflicts with other events that may compete for the public's attention, to secure a suitable venue, and to give people time to get the event on their schedules. There are additional considerations that need to be addressed in vision planning organization.

Recognize that you are scheduling multiple events and need to allow enough time for consultants to prepare materials but not so much time that people lose interest.

### **Workshop Staging**

Venue and room layout: The location where you hold the workshops will need to provide adequate space for the planned activities and anticipated participants. If there are going to be PowerPoint or slide presentations, can the space be darkened? If there are going to be breakout sessions, is there room for separation? If you are doing mapping or drawing activities, is there enough table space? You should always have food; where will that be located? The location also needs to be a place where all community members feel welcome and comfortable.

Meeting date and time: The timing of the workshop is also important. If meetings occur late at night or during work hours, people may not be able to attend. How long should your session be? You need time to have a constructive meeting but if it is too long people may be unwilling to attend or return for the next one.

Assign tasks: There are tasks that need to come together prior to and on the day of the workshop. While the consultant will often take responsibility for many of these, there are others that will likely fall to the advisory committee and/or community volunteers. Think about:

- Activities and agenda
- Materials and equipment
- Hospitality
- Facilitation
- Media coverage

### **At the Start of the Workshop**

With good planning you and your consultants will have everything ready on the day of the workshop. Consider the following tasks associated with the day of the workshop:

- Sign-in and greeting
- Documenting all participants
- Collecting contact information
- Preparation and distribution of a descriptive agenda
- Distribution of informative handouts
- Managing activities for people prior to start of the workshop
- Introducing participants

### **At the End of the Workshop**

- Thank all participants
- Provide information on next steps
- Date and location of next workshop
- Recruit new volunteers
- Collect workshop evaluation form and activity worksheets
- Identify people to speak with media
- Clean up

### **Keeping People Engaged**

Once you have been able to bring residents into the vision planning process it is important to keep their interest. An effective communications strategy will be very helpful in this regard. Consider:

- Providing ongoing communication
- Offering voluntary activities between workshops
- Sponsoring lectures and community forums
- Providing opportunities for leadership

## WORKSHEET: REFLECTING ON PAST EXPERIENCES

Use this worksheet with others on your committee to consider past experiences with public participation and in what ways those might inform your current planning process.

Describe the planning process.

Describe the purpose and nature of the public participation.

How were the participants informed of the opportunity to participate?

Was their facilitation at the public sessions?

What was successful?

What could have been improved and How?

## WORKSHEET: IDENTIFYING LOCAL STAKEHOLDER GROUPS & RESOURCES

Use the chart below to identify stakeholder groups that might contribute resources and skills to assist you with your work program.

Stakeholder Groups	Expertise or Purpose, Services, & Resources
Organizations	
Individuals	
Agencies	

**ACTIVITY 1:  
DEVELOPING AN OUTREACH PLAN**

**A. Typical Ways of Getting the Word Out:**

1. Informal methods of sharing information

---

---

---

---

---

---

---

---

2. Organizations and Networks that could share information

---

---

---

---

---

---

---

---

---

---

3. Print or broadcast media for sharing information

---

---

---

---

---

---

---

---

**B. What needs to be Done: Tasks**

Use the chart below to list the tasks or actions that will be part of the outreach plan for your community.

<b>Task or Action</b>	<b>Order of Implementation</b>	<b>Responsible Party</b>

**C. Create an Outreach Plan Timeline**

Organize the tasks that you have defined above using the timeline provided and Post-it© notes.

## **PRESENTATION 3:**

# **The Community Workshop Process**

In BOA Step 1, the first visioning workshop activities focus on uncovering and understanding local values, identifying issues and opportunities, and describing a desired future. With this understanding, the community begins to draft an initial vision statement and goals. This is followed by a second workshop where participants revise and confirm the draft vision and goals, and begin to consider strategies to address the identified issues and build on opportunities and accomplish their goals.

### **The First Community Workshop**

The first BOA Step 1 vision planning workshop is an opportunity to talk with community members about the way they value their community, the issues that concern them, and the opportunities that they see for future improvement. This experience enables participants to see their community from a new perspective and to think differently about its future. For many, this workshop provides a new sense of hope and a constructive process in which they can participate.

### **Keys to Facilitating a Constructive Dialogue**

Vision planning requires thoughtful organization and skilled facilitation.

1. Establish a space for dialogue: It is important to create an environment that is conducive to constructive dialogue. Consider the following:
  - The group size – small groups give individuals a greater opportunity to share ideas
  - The meeting space – if you are going to divide people up into discussion or working groups there must be room for separation and acoustics will be important
  - Facilitation – keep group on track, enable every one to contribute, use effective questioning to help people clarify ideas, assure that all points of view can be presented
  - Ground rules for participation – make it clear that this is not about controversy
  - Include a range of activities – everyone has different ways of expressing themselves
2. Establish a collaborative working relationship between community and professionals: Your consultant leading the vision planning process should be genuinely interested in what the community has to say and serious about recording and analyzing the workshop activities.

3. Use images to clarify ideas and focus discussion: Drawings, photographs and models are important facilitation tools in vision planning. Images present rich information that helps people express and clarify their thoughts and ideas.

### **Workshop Activities: Asking Questions, Recording Answers**

It is important to have skilled facilitators at the workshop to:

- Introduce the activities
- Encourage discussion, and attentive listening
- Keep discussion on track
- Help the group clarify ideas
- Record the community responses.

There are methods and techniques to collect, record and analyze local experience and knowledge. Possible techniques include:

- Surveys
- Nominal Group Technique (brainstorming)
- SWOT analysis (Strengths, Weaknesses, Opportunities and Threats)
- Community mapping
- Walking tours
- Photography (e.g., photo surveys)
- Stories and narratives

### **Workshop Follow-Up**

Following the workshop there are a number of things that must be accomplished:

- Organize the data gathered at the workshop
- Prepare a summary and analysis of the data
- Document findings to share with the community
- Prepare a draft vision statement and goals
- Evaluate your workshop process
- Develop activities for following workshops

### **Evaluating the Workshop**

Evaluation should be an ongoing activity over the course of your BOA.

It enables the committee and consultant to understand what has worked well and to identify aspects of the process that you might adjust to improve later workshops.

There are many different ways to conduct evaluation. The types of questions you might ask include:

- Participation – How many and who attended? Did we have broad community representation? How did they learn about the workshop?
- Understanding – Do participants understand the purpose of the project, the workshops, etc.?
- Satisfaction with workshop – What was their reaction to the activities? Did they feel comfortable participating?



## ACTIVITY 2: REVIEWING VISION STATEMENTS, GOALS AND OBJECTIVES

### B. Goals and objectives

#### Vision Statement:

The city of Westerly is a regional center with a friendly, small town atmosphere that serves as a gateway to Bear Lake, the Delta River and the northern mountain state preserve. Delta River is central feature of the city providing a variety of public and private recreational opportunities. The city's rich cultural, industrial, and architectural heritage is preserved and presented as a source of pride. The city maintains a strong and diverse economic base that provides opportunities for residents and visitors.

#### Goals and objectives:

**Goal 1:** Recognize, improve, and maintain the environmental quality of the Delta River.

#### Objectives:

---

---

---

---

---

---

---

---

**Goal 2:** Embrace the river as an economic and recreational resource within the community and expand opportunities that stimulate a balance of public and private growth and development.

#### Objectives:

---

---

---

---

---

---

---

---

**Goal 3:** Establish a strong relationship between downtown and the river, which provides year round businesses and services tailored to the needs of the community and visitors.

#### Objectives:

---

---

---

---

---

---

---

---

## PRESENTATION 4

### Refining the Vision

#### A. Refining the Vision

In BOA Step 1, you prepared a draft vision with goals and objectives. This draft vision likely established a framework for your inventory and analysis and your market and economic feasibility study. As you gain a fuller understanding of environmental and physical conditions, and market potential it is necessary to revisit the draft vision in BOA Step 2 stage.

#### **Vision Planning: An Integrated Activity in the BOA Program**

BOA Step 2 provides an opportunity to test the feasibility of your draft vision. Given the new information that has been gathered and your increasing understanding of the conditions and opportunities, does the vision seem well directed? Were there opportunities that were overlooked? In BOA Step 2, you use community participation to refine and, if necessary modify, the draft vision while bringing greater clarity and specificity to your vision, goals and objectives. This refinement will enable the community to explore redevelopment alternatives and identify/describe potential catalyst sites.

#### **Sharing the Vision Process, Findings, and Draft Vision**

In the first BOA Step 2 workshop, begin by reviewing the issues that were explored and the decisions that led to the draft statement, goals and objectives in BOA Step 1. Following the review of Step 1 activities and the draft vision, the new information gathered since the draft vision was developed will be presented. An understanding of this information will enable participants to refine, detail and focus their vision and, with greater focus and clarity, begin to identify strategic sites and explore redevelopment options.

#### **Exploring Alternatives**

Exploring alternatives is an important aspect of the BOA Step 2 vision planning process. Studying alternatives side-by-side, it is possible to compare the strengths of the different proposals. During this process is it important to:

- Help everyone understand the conceptual nature of the alternative studies
- Keep everyone's attention focused on the big ideas
- Avoid getting stuck on the details

#### **Presenting Alternatives**

Sometimes with brownfield sites it is hard for community members to imagine change and what it would look like. Work with your consultant to develop strategies for presenting alternatives. For example, the use of before-and-after perspectives can help people imagine sites differently.

### **Evaluating Alternatives**

The ultimate purpose of the exploration of alternatives is to evaluate the alternatives, document the community assessment of each alternative, and begin to develop criteria that will guide the final proposal or strategy. Your consultant should facilitate this process and provide the mechanism for recording the evaluation.

### **Establishing Criteria and Selecting Strategic Sites**

As the vision planning progresses, redevelopment strategies can be tested and refined, and criteria developed to identify strategic sites.

## **B. Documenting and Sharing the Vision**

By the end of BOA Step 2, you will likely have completed your vision planning process. At this point it is time to share the BOA vision more broadly. There are many ways to share your vision. Consider presentations and exhibits of the materials that your consultant will have developed through the vision planning process.

### **Executive Summary**

Many communities produce an executive summary to share their vision. The format can vary from community to community depending on the needs of the community, their budget and the intended use of the plan. Keep in mind that your products should reflect the thoughtful nature of the process and the community's commitment to quality. Invest in good layout design and production and produce materials that can be used in multiple ways.

The executive summary should include:

- Process
- Participants
- Key issues
- Vision statement
- Goals and objectives
- Proposed revitalization strategies and plans

### **Integrating Images and Text in the Executive Summary**

Use images to illustrate the character and intention of the vision. Images make intent clear, enable people to imagine the redevelopment and can generate excitement and support for implementation efforts. However, images often also require text to focus the reader's attention on the important details in the illustrations. Organize your documents so that the text and images are well integrated and related. Remember that good communication requires a clear message. The narrative text needs to be straight forward, engaging, and accessible to community members.

## PRESENTATION 5

# Outcomes of Vision Planning

### The BOA Vision

Your BOA vision will clearly document the community's desired future through text and illustrations. Once completed, the vision will provide:

- A framework for action
- A measure against which the community can evaluate future development proposals, and
- A list of priority public projects to accomplish community revitalization

### BOA Visioning Outcomes

The outcomes of the BOA vision planning process include:

#### 1. Public Support

- Community excitement and interest
- Educated and informed public
- Local leadership
- Newly recognized resources

#### 2. Action Strategies

Your BOA vision plan will clearly identify immediate steps that can be taken to implement the vision using existing community resources and volunteers to accomplish identified projects. Some of these actions are organizational, some are community celebratory events, and others are discreet projects and the initiation of funding strategies. The set of action strategies associated with the vision plan goals will help to guide implementation of the vision plan.

#### 3. Identification of Catalyst Sites and Priority Projects

The vision process will identify catalyst sites and provide preliminary list of revitalization projects.

#### 4. Documents that share the vision

Summary communication pieces such as fliers, posters, exhibits, websites and DVDs can be used to share the vision. These products will help community members that were not involved, better understand the process and recommendations. They will also be useful to the advisory committee as they share the vision with state and federal agencies, potential developers, nonprofits and regional neighbors.

#### 5. Experienced Advisory Committee

Finally, you will have an organized and experienced advisory committee prepared to guide the BOA program and to implement the vision. Their organization and leadership experience provides both stability and continuity.

*Supplemental Material*

---

# Vision Plan



A **Vision Plan** is a community created plan that is the foundation to guide future action. It is grounded in community members vision of what they think the community should be. The Vision Plan is composed of several interrelated pieces.

The **Vision Statement** represents the collective view for the community's future. It emerges from community dialogue and incorporates common values. This 'umbrella' statement is very broad but community specific.

The **Goals** support the Vision Statement and describe its component parts in more detail. Identifying goals is the first step towards implementation of the vision.

For each goal, specific **strategies or action plans** are developed that a community can take to implement the vision.

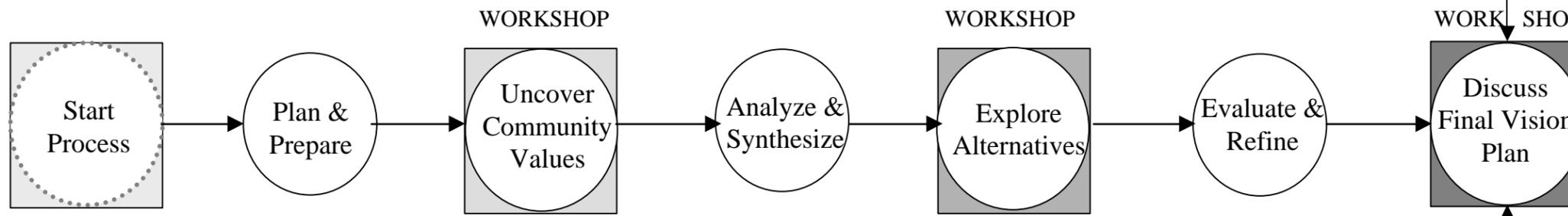
# Waterfront Initiatives Visioning Process

September 2001



## Visioning Process

An interactive **participatory process** that is open to all community members and stakeholders. The intent is to establish **dialogue and collaboration** among participants in order to discover **common values** upon which to base the **Vision Plan**.



Facilitator meets with a core group of community members to initiate informal conversations and to discuss project coordination and outreach. After setting a schedule this group works with the facilitator to publicize the process, explain project intent and notify residents of scheduled activities.

Facilitator must understand information needed and select participation methods and activities to help answer specific questions. Plan for the use and management of data before obtaining it. Design workshop activities to encourage interaction, discussion and stimulate interest.

Through workshop activities participants reveal ways they use and value their community by identifying favorite places, traditions, activities, and important natural and built features. They also identify important opportunities and issues, and discuss what they would change if it could.

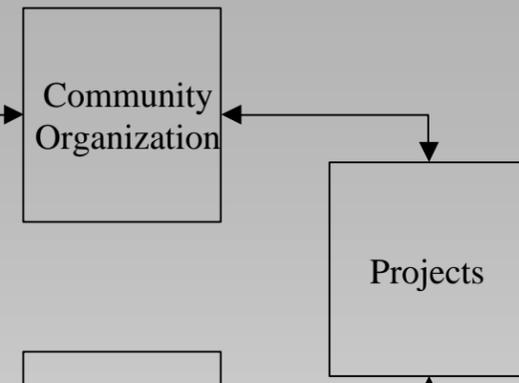
Facilitator organizes, documents, analyzes and synthesizes workshop data to determine common values, opportunities and concerns. Based on these findings, the facilitator prepares a draft Vision Statement and Goals. Workshop activities are designed to help participants refine Vision the Statement.

Community reviews summary findings and the draft Vision Statement. Through workshop activities, participants explore alternative expressions of the vision, consider future choices and begin to identify actions that they can take to implement their vision.

Facilitator organizes, documents, analyzes and synthesizes all workshop and other background data to refine vision statement and goals, and to prepare specific action steps to begin implementation.

Facilitator presents Final Vision Plan. Community reviews, discusses and identifies short and long-term priorities. The group also discusses strategies for continued community participation and management of the implementation process. Set date for next meeting.

## Implementation



Community assumes primary responsibility for implementation, deciding which combination of approaches best match their needs and resources. Approaches may include tapping community members time and expertise, preparing guidelines and standards, or exploring physical improvements through design studies. All strategies and decision should be grounded in the Vision Plan

On-going support is provided by CCDR, state agencies and local and county planning departments.

○ Facilitator Responsibility

□ Community Responsibility



# Conducting effective meetings

The responsibilities and “rules” that are outlined below can be helpful to the coordinating committee, the task forces and sub-task forces. Reviewing these responsibilities and rules will help in running meetings more smoothly, cooperatively and effectively.

## I. Responsibilities of a chairperson

### 1. Know your committee

- ▶ Clarify how long you will be chairperson.

### 2. Prepare for meetings

- ▶ Prepare an agenda. Notify all members well in advance. Find a meeting location and ensure that it is adequate and comfortable.

### 3. Facilitate the committee meetings

- ▶ Open the meeting and go over the agenda. Ask members to add any additional items. Know what you hope to accomplish at the meeting.
- ▶ Follow the agenda; when discussion gets off track, bring it back to the topic.
- ▶ Ensure free and open discussion—don't let some dominate. Encourage quiet members to participate.
- ▶ During the meetings, treat every member as an important part of the committee. Use their talents. Delegate responsibilities.

### 4. Establish a team.

- ▶ Be prepared to deal with disagreements and/or conflict situations. Know when to make decisions.
- ▶ Develop a process for making decisions, such as consensus, or voting on a majority or super majority basis. Then stick to that process.
- ▶ Summarize discussions and decisions made.
- ▶ At the end of the meeting, summarize the evening's major decisions. Set the next meeting date, when, where and its purpose. Summarize tasks to be done before the next meeting and who will do them.

### 5. Get your committee working

- ▶ Develop an orderly agenda or version to accomplish the goals.
- ▶ Identify the interests, skills, talents and expertise of each committee member and their unique contributions to the committee.
- ▶ Identify specific tasks to be done.
- ▶ Ask for volunteers or assign individual members tasks according to their interests, skills, knowledge or expertise.
- ▶ Identify resources needed to accomplish the task.
- ▶ Develop a time frame by which to accomplish the tasks.

### 6. Keep the committee going

- ▶ Follow through with members to assist, support and encourage.
- ▶ Communicate frequently with committee members to give them updates and get their input.
- ▶ Communicate with the larger organization to keep them informed of the committee's progress.
- ▶ Ensure that tasks are completed on time.
- ▶ Thank members for their contributions.

### 7. Completing your job

If the committee is ongoing, identify someone early in your tenure as chairperson to take your place. Work closely with that person.

Ensure tasks are accomplished in a timely manner and in the manner expected by the larger organization.

- ▶ Deliver a final report back to the larger organization.
- ▶ Thank members for their contributions to the committee. Point out the committee's accomplishments and how they were received by the larger organization and/or the community.
- ▶ If a new chairperson continues the committee, work with him/her to ensure an easy transition that does not disrupt the functioning of the committee.

Taken from:

A guide to Community Visioning

By Gary Green, Anna Haines, and Stephen Hallebsky

## II. Responsibilities of a committee member

### 1. Know the purpose of your committee

- ▶ What is the purpose of the larger organization?
- ▶ What is the task or purpose of this committee?
- ▶ How does this committee relate to the other committees of the organization?
- ▶ Who are the other members of the committee?
- ▶ How will a chairperson be chosen?
- ▶ How often will the committee meet?
- ▶ What is expected of me?
- ▶ How do we communicate with each other?
- ▶ What is the expected outcome of the committee? Written report? To whom? By when? An oral report? To whom? By when? Recommendations for policy? To whom? By when? Action?
- ▶ When is the committee expected to complete its task?

### 2. Participate in committee meetings

- ▶ Attend all possible meetings.
- ▶ Be prepared before you go to the meeting. Know the purpose of the meeting. If any assignment was given, have it completed. If known, give thought to the agenda and issues to be discussed.

- ▶ Participate actively (but don't dominate) at the meeting.
- ▶ Be on time.
- ▶ Be enthusiastic.
- ▶ Listen to others.
- ▶ Pay attention.
- ▶ Try to understand the topic.
- ▶ Express your ideas concisely.
- ▶ Encourage others to participate.
- ▶ Don't tell stories which take the meeting off track.
- ▶ Don't complain.
- ▶ Support committee decisions.
- ▶ Be willing to serve at times as a leader, other times as a supporter to others.

### 3. Follow through on your assignment

- ▶ If you have been asked to do something, or you volunteered, do it!
- ▶ Inform others of your actions.

## III. Conducting effective meetings

One of the best ways to involve people in a community is to encourage them to participate in community meetings. Knowing how to set up and conduct meetings is an important tool. *How you* act before, during and after the meeting will determine how successful you are at maximizing citizen participation. Here are some points to keep in mind:

### 1. Before the meeting

- ▶ Establish a time, date and place which you feel would be most convenient to as many of the people as possible. Keep in mind such things as parking, air conditioning, other community activities scheduled for the same night, etc.
- ▶ Send out notices to everyone on the committee giving them details of the meeting and a meeting agenda at least ten days prior to the meeting. Follow up with a second notice two or three days before the meeting date.
- ▶ If outside resource people or speakers are involved, be sure to give them the vital statistics as to date, time, place and how to get there well in advance of the meeting.

### 2. At the meeting

- ▶ Be sure you come early enough to get the room set up the way you want it. Remember, people participate best when they can see each other! If possible, put the chairs in a circle rather than straight rows.
- ▶ If the participants don't know each other, provide name tags or make introductions.
- ▶ Start on time!
- ▶ State the purpose of the meeting as briefly as possible. Use a large sheet of paper or a blackboard to list some of the points to be covered in the meeting.
- ▶ Speak confidently, but don't be too formal; try to help others feel at ease.

- ▶ The best way to stimulate discussion is to ask questions, not make statements. Remember, people prefer to be asked, not told!
- ▶ Sometimes it's helpful to have a coffee break during the meeting. It gives people time to visit informally about what is being discussed. This is especially true before important decisions are going to be made. Five or ten minutes is usually enough.
- ▶ At the end of the meeting, try to summarize briefly what's been talked about. Get some ideas from the participants about what to do and where to go from here.

- ▶ Remember, the success of a community meeting is everybody's responsibility. If you are the discussion leader or chair, your job is to help create the environment for interaction and stimulate, rather than dominate, the discussion.

### **3. After the meeting**

The follow-up that's done after a committee meeting is very important.

- ▶ Visit informally with some of the committee members a few days after the meeting. Get their impressions of what happened during the meeting.

- ▶ You might try sending out a follow-up report to those attending the meeting, simply putting to paper what was discussed during the meeting.

## **IV. Committee self-evaluation**

This worksheet can be used by the coordinating committee, task force and sub-task force to assess how their committees are working and to keep them working effectively.

# Committee self-evaluation

**YES**    **NO**

- Is the meeting place comfortable, accessible, attractive?
- Does the committee understand its assignment?
- Is the agenda carefully planned and thoughtfully worked out by the whole committee?
- Do members transact their business efficiently?
- Does the committee represent different viewpoints?
- Do members feel they really *belong* and are a part of the committee?
- Are members satisfied with the way decisions are made in the committee?
- Is the committee willing to be accountable to the parent group?
- Does the committee spread its work assignments to others?
- Can the committee make constructive use of conflict, opposition, or criticism?
- Is the committee flexible and adaptable?
- Does the committee obtain facts, study and analyze them, make decisions as a result of full discussion—and then take appropriate action?
- Do members feel that time is used wisely and have a sense of real achievement?
- Do meetings start and stop on time?

Good committees have “yes” answers to most or all these points. A “no” indicates a point that needs improving. How much improvement does your committee need?

*Source: Ayres et al. 1987. Take Charge: Economic Development in Small Communities. North Central Regional Center for Rural Development. pp.181–186.*

# Sample press release

This sample press release can be used as needed for either the short- or long-term version. All meetings should be advertised. As much as possible the visioning process should allow the public to voice its concerns and opinions. The wording will need to be changed depending on the type of meeting that your committee or task force is convening.

## Sample press release

Date

Contact:

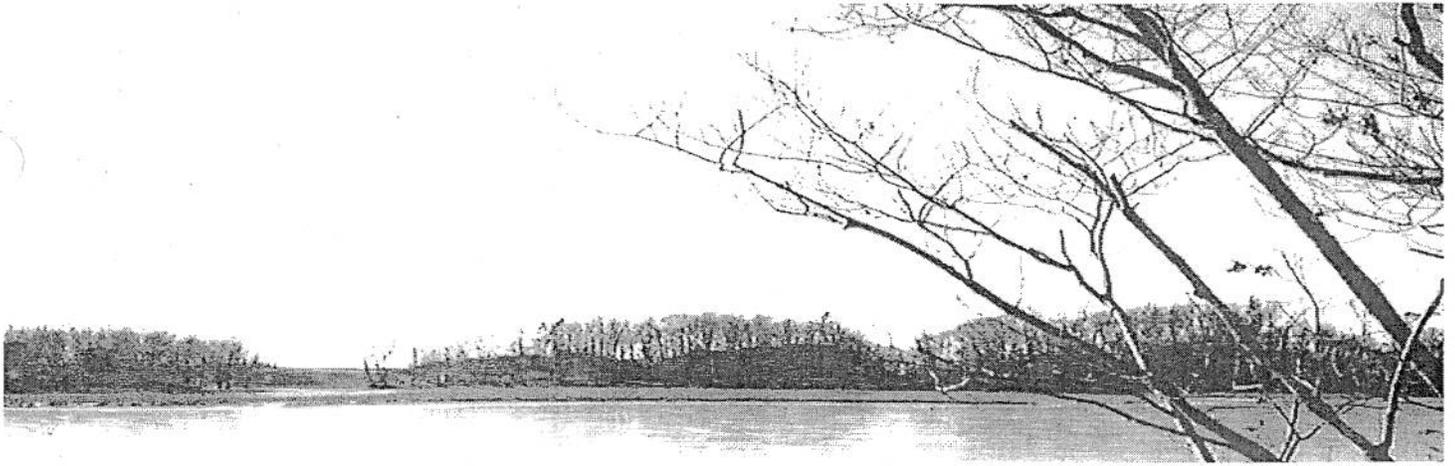
Community Workshop: Creating a Community Vision: Looking to the Future

Wisconsin's rural and small towns are changing. Change can mean increased economic and social opportunities. It can also mean urban sprawl, destruction of farm land, and an eroding quality of life. Every community in Wisconsin has the power to control change.

University-Extension, the Jefferson Chamber of Commerce and the City of Jefferson will conduct a workshop on how Jefferson can begin to develop a regional vision. Entitled, *Creating a Community Vision: Looking to the Future*, this workshop will be held March 7-8, 1998, at the Jefferson Community Center. It will start at 6:00 p.m. and last for about 3 hours. The following day at the same location will go from 9:00 a.m. to 3:00 p.m. with a lunch break.

It is not enough for a community to know what it doesn't want: A community needs know what it wants and to have a strategy for achieving it. To help achieve this, a vision is needed. Visioning is a process by which residents are given the opportunity to develop a shared vision of the future and develop strategies to arrived at that vision.

Anyone interested in being apart of this visioning process, please register at Jefferson Municipal Building at 287-983-0863.



# The Great Sodus Bay

## A Vision for the Future

Town of Huron

Town of Sodus

Village of Sodus Point



### **OPEN FORUM: DESIGN AND PLANNING**

**WHERE:** Fresh Water Institute

**WHEN:** Thursday, May 24, 2001

**TIME:** 2:00 – 7:00 pm



During the summer students and faculty from SUNY College of Environmental Science and Forestry will continue working with the Great Sodus Bay community in a vision and planning process begun in February. The team will focus on developing an open-space recreation plan, which incorporates existing public lands, areas of unique or environmentally-sensitive value, and waterfront access.

We are very interested in continuing our dialogue with community members. On Thursday, May 24<sup>th</sup> we will set up shop at the Fresh Water Institute for discussions and questions. Please stop by and give suggestions. Your input will make a difference.



# Budget items

The purpose of this table is to help the coordinating committee and task force estimate the cost of community workshops. By figuring out how much funding is necessary to conduct the community workshop, the coordinating committee and the task forces can more effectively request assistance from local organizations either through in-kind contributions (you should include the name of the organization and a contact person in the table) or through an organization's financial commitment.

<b>Budget items</b>	<b>Estimated amount in \$\$</b>	<b>In-kind contributions</b>
Publicity		
✓ printing and mailing flyers		
✓ producing a poster		
✓ placing announcement in local media		
<b>Materials for the workshops</b>		
✓ name tags		
✓ markers, pens, writing paper		
✓ flip charts		
✓ large paper to post on the wall		
✓ tape		
✓ food and refreshments		
<b>Acquiring and analyzing data</b>		
<b>Other</b>		
✓ preparation and dissemination of reports		
✓ staff time		
✓ computer time		
✓ telephone service		
✓ office supplies		
✓ facilities for meetings and workshops		
✓ cleanup		
<b>Contingency</b>	Estimate about 10%	
<b>Total</b>		

Taken from:  
 A guide to Community Visioning  
 By Gary Green, Anna Haines, and Stephen Hallebsky

# Checklist for workshop

## Location

- Does the room have adequate seating?
- Can seating be arranged to maximize participation?
- Non-threatening to any potential participants?
- One room large enough for entire group to be seated at tables?
- Access to needed number of comfortable chairs and table (1 table/4-6 people)?
- Is the room suitable for the use of equipment?
- Will AV equipment and flipcharts be available?
- If equipment is needed, who will provide it?
- Are there breakout rooms, or areas available for small groups to meet?
- Is there a place to serve refreshments? A kitchen or place to store and prepare food/refreshments?
- Are there suitable restroom facilities?
- Is the room/building accessible to people with disabilities?
- Is there adequate parking?

- Is the building conveniently located and well known to residents?
- Is the building considered a "neutral" site?
- Is there a phone for emergency use?
- Is there a single contact person to make sure the building will be opened?
- Is the location convenient to everyone?
- Are the acoustics good (a microphone should be used if more than 30 people)?
- Adequate ventilation/heat?
- Adequate lighting?
- Are room(s) available for child care, if necessary?

## Promotion

- Will a brochure be used to promote the workshop?
- Who will design and print it?
- How many will be printed and who will pay?
- Who will supply the names and addresses?
- Who will pay for postage?
- Who will keep track of the pre-registrants?

- How will the brochure be distributed?
- Will a media release be sent?
- Who will write it and send it to the media?
- Who will be the contact person?
- Who will do the follow-up to ensure the media attends the workshop?
- Will any contact be made to local officials to ensure their attendance?

## Setting up for the workshop

- Put up signs directing people to site.
- Place registration table near door of meeting room.
- Place refreshment table close to or in meeting room.
- Arrange tables for small groups of 4-6 people (round tables work best).
- Set up child care room.

Taken from:

A guide to Community Visioning

By Gary Green, Anna Haines, and Stephen Hallebsky

## Equipment

- Flip chart pads and stands (at least 2, but may need more with larger group)
- Microphone with cord long enough to reach the back of the room, or a cordless microphone
- Overhead projector and wall or screen

## Supplies

- Sign-in sheet for registration table
- Name tags (large letters for first name only; prepare ahead of time if possible)
- Colored markers (black, blue, green, brown, and purple are the most easily read; need 1 marker for every 2–3 participants)
- Several rolls of masking tape
- Four–five pieces of newsprint (flip chart paper) cut in half for each table
- Beverages/refreshments/food
- Plates, utensils, napkins, etc., as needed

## At the workshop

- Will pre-printed name badges be used?
- Are directional signs needed to the meeting room and breakout rooms?
- Will someone be available to greet attendees as they arrive?
- Will there be a sign-in sheet for attendees?
- Will there be an information packet of attendees?
- What will be in the packet?
- Will there be worksheets for attendees?
- Will someone be available to oversee refreshments?
- Who will pay for the refreshments?
- Will participants be pre-assigned to breakout groups?
- Will the proceeding be recorded?
- If so, who will do the recording and how will it be distributed?

## Follow-up

- Will any information be sent to attendees after the workshop?
- Who will prepare this information?
- Who will pay for the postage?
- Who will answer any follow-up questions?

*Adapted from: The Center for Rural Pennsylvania and Leuci et al. 1997*

# Vision Committee to begin series of workshop sessions

By ROB JUTEAU

*Evening Times Staff Writer*

DOLGEVILLE — The Vision Committee will hold its first series of workshops over the next two days and people are already talking.

Manheim Town Supervisor Raymond "Dutch" Smith reported to the town council at last night's meeting that he has had people in the town office offering ideas.

"I think this is an opportunity to point Dolgeville in the right direction and get a good start for the year 2000. It does have people thinking," Smith said.

Smith said that one of the offered ideas was using some of the machinery from Daniel Green to create a working museum.

"They said we could set up a working museum where they could produce shoes and maybe sell them in the Daniel Green Outlet store," Smith said. "Of course not that many shoes would be produced, but they would be of a high quality."

Smith said that it would give people the opportunity to see the shoe making process and suggested a similar idea for North Hudson logging.

"We have a lot of history in this area and it would be shame to let it all go," Smith said.

Cheryl Doble, Professor of Environmental Science and Forestry at Syracuse University, and Sue Thering, one of Doble's students, were scheduled to hold workshops today at Parkside Court Recreation Room from 10-11:30 a.m. and from 1-2:30 p.m. at Dolgeville's Firemen's Pavilion. An evening workshop is

scheduled at Arthur's Restaurant from 7-8:30 p.m.

Tomorrow, Aug. 12, workshops are planned from 10-11:30 a.m. and from 1-2:30 p.m. at Dolgeville Central School and at the Dolgeville Firehouse from 7-8:30 p.m.

Using the old soda fountain, which is currently located in the Dolgeville News Shop, to create ice cream or in some other capacity was another idea Smith reported hearing.

"It's things like this that may possibly hit on stuff that will bring people in here," Smith said. "Maybe something will come out of this."

The goal of the Vision Committee is to establish a vision for

Dolgeville's future and develop design plans that would enhance the community. The workshops are hands-on and will allow attendees to work with maps, photographs and models. As a result of the workshops, Doble and Thering will develop and illustrate a vision plan for the community and several specific design proposals.

Following the *Issues and Opportunities* workshops, Doble and Thering will return on Aug. 24 and Aug. 25 to present *Design Solutions* workshops.

# Dolgeville residents take reins of village's future

By TRACI GREGORY  
Observer-Dispatch

**DOLGEVILLE** — The residents of this small village decided not to take the loss of business and industry lying down, and come September, they will see the first results of their work.

That's when Cheryl Doble, a professor at SUNY's Syracuse School of Landscape Architecture, and graduate student Sue Thering will present design plans to rebuild the village's future based on information they have gathered during a series of workshops.

The workshops are the brainchild of the Vision Committee, formed after Chairwoman Carol Gates and Planning Board Chairman Fred Wein attended a "Your Town — Designing its Future" workshop last spring at Beardslee Castle outside Little Falls. The workshop was sponsored by the Syracuse School of Landscape Architecture, the Mohawk Valley Heritage Corridor Commission and the National Trust for Historic Preservation.

The first of the committee's workshops, which took place earlier this month, focused on issues troubling the village, as well as opportunities.

Dolgeville High School teacher Kathy Winkler hoped some of the workshops focused on economic development and recreation. "I love this little community, but it seems like everything is leaving us," she said.

"It would be nice to have more facilities, especially for kids involved in Little League, Pop Warner or other sports," she said. There also needs to be more for teen-agers to fill in the gap when there are no activities at school, she said.

The village once was home to a movie theater and a roller-skating rink, but both are long gone. The wave of business departures, especially the recent changes at Daniel Green Co., has hit the village hard. The company, a major employer in the village, has shifted its manufacturing process to other locations.

But despite the losses, residents are confident they still have much to offer. While no longer used as a manufacturing facility, the Daniel Green shoe factory building still houses a museum on the history of shoe manufacturing. The village also is home to the Rawlings-Adirondack Bat Co., which produces the bats used by home run hero Mark McGwire. The nearby East Canada Creek offers a



By MICHAEL DOHERTY, Observer-Dispatch

Marjorie Youker waters her flowers at her Ransom Street home in Dolgeville.

## ► VISION WORKSHOPS

Dolgeville's vision Committee workshops will be conducted at the following times and locations:

### Today

- 10 to 11:30 a.m., firemen's pavilion, for mothers and children.
- 1 to 2:30 p.m., Parkside Court recreation room, for seniors.
- 7 to 8:30 p.m., firehouse, for all boards and town of Manheim farmers.

### Wednesday

- 10 to 11:30 a.m., school, for parents, teachers and the historical society.
- 1 to 2:30 p.m., school, for teens.
- 7 to 8:30 p.m., Arthur's Restaurant, for the Lions Club, Rotary Club, Dolgeville Area Business Association and town of Manheim farmers.

host of activities, such as swimming or fishing for outdoor enthusiasts.

Mary Puznowski, owner of A Painter's Garden, 24 S. Main St., said tourism is the key to turning the village's business climate around, and that's where attractions, such as the bat company or the creek, come into play.

"If we can promote tourism here, it's going to help the business people stay alive," she said. "We have an attractive town. We think people will come shopping here."

Focusing on the village's historical ties, such as its role in the Underground Railroad, is one way to boost tourism, she said. A fresco in the Dolgeville Post Office shows a scene from the Underground Rail-

road on the Zenas Brockett farm.

Sprucing up Main Street, possibly with some trees, is another, as is capitalizing on the nearby East Canada Creek.

Puznowski attended one of the workshops and felt it was a great way to touch base with residents. "It's exciting to see the energy of the townspeople," she said.

Gates said that's what the workshops are all about. "This is a way of pulling in people who haven't been involved before." From day one, she said, organizers knew they wanted this to be an effort of as many people as possible. Ideas, she said, should come from the residents, not just the committee or other officials.

Doble said the first round of workshops allowed her and Thering to get an idea of what people want to see in the village. Through a variety of activities, they gauged what people like and dislike about the village and what sort of facilities and amenities they want.

More workshops, this time to discuss some design solutions based on the ideas discussed at the first workshops, will take place today and Wednesday.

Doble and Thering then will offer some project ideas and suggestions at a community meeting in late September. Doble said the plans could contain anything from beautification and streetscape improvement plans to a plan for a new playground. The key is the plans reflect what residents want, she said.

# Facilitating Community Workshops

## Small group discussion sessions

These working sessions are intended to bring together diverse groups of people for open discussion of the issues vital to the neighborhood and community. They are intended to stimulate cooperative problem solving and to engender consensus building in a short period of time. Each small group will have a discussion facilitator to keep things moving forward.

## Role of the facilitator

- Introduce each session and briefly describe what will be covered.
- Try to keep on schedule.
- Keep discussion on track and help assure balanced participation.
- Be on the lookout for confrontational patterns and/or domination by one or two group members.
- Remind participants of the ground rules as appropriate, and ask for help from other group members or facilitators, if necessary.
- Avoid steering or leading the group in any particular direction, as long as the discussion is “on the subject.” Be extra careful not to dominate the discussion yourself.
- Help participants invent creative alternatives when the discussion becomes “stuck” or polarized.
- Emphasize brevity and conciseness; this will help to clarify participants’ thinking.
- Encourage participants to continue their discussions after the formal session is over.
- From notes taken during the session, identify succinct key points, such as the primary issues, consensus items, and prioritized lists. Use the easel for presenting these highlights to the full workshop, not to record every comment.
- At the end of each session, check the proposed summary with the group.
- Be prepared to summarize briefly (2 minutes) the small group’s ideas to the larger group; do not repeat all the points that were made, just the highlights.

### **Ground rules for participants in discussion sessions**

Listen carefully to others. Everyone's opinions and feelings are important.

Respect other points of view, even if you don't agree.

Be "yourself". Speak openly and honestly from personal experience.

Do not criticize others or rehash past conflicts.

Don't argue over facts. Agree to disagree until an answer is found.

When disagreement occurs, acknowledge that conflicts exist and try to understand the other points of view.

Focus on areas of agreement and try to expand them.

Keep an open mind.

### **Ground rules for participants in discussion sessions**

Listen carefully to others. Everyone's opinions and feelings are important.

Respect other points of view, even if you don't agree.

Be "yourself". Speak openly and honestly from personal experience.

Do not criticize others or rehash past conflicts.

Don't argue over facts. Agree to disagree until an answer is found.

When disagreement occurs, acknowledge that conflicts exist and try to understand the other points of view.

Focus on areas of agreement and try to expand them.

Keep an open mind.

## **Watertown: Imagining the Future Workshop Series One Outline**

Monday, Feb.24, 8:00 a.m., HSBC, Conference Room, 120 Washington Street

Sponsor: Downtown Business Association

Wednesday, Feb.26, 9:00 a.m., The Mercy Building Conference Room, 235-255 State Street

Sponsor: Neighbors of Watertown

Friday, Feb.28, 1:00 p.m., HSBC, Conference Room, 120 Washington Street

Sponsor: Greater Watertown-North Country Chamber of Commerce

Saturday, March 1, 9:30 a.m., City Hall 3rd Floor, 245 Washington Street

Sponsor: Watertown City Planning Department

We chose to hold four similar workshop segments, all consistent with this outline, in order to accommodate and include diverse interests in the visioning process. Detailed activity sheets describing the objectives, process, materials and staff were created to maintain constant form and are included as part of this index.

### **Greetings**

Have participants sign in, get nametags, and an entry survey.

### **Entry Survey**

Done individually while waiting for the workshop to begin. Give to facilitator when finished or handed in at end of session.

### **Welcome and Introduction of Team**

Watertown representative (often host of facility) welcomes residents to the meeting and introduces a CCDR representative (Cheryl or Maren) who introduces student facilitators and explains the process.

### **Introduce Photo Survey**

Open up the idea to participants interested in volunteering for photo survey.

### **Activity 1: Storyline Mapping**

Hand out worksheets and maps during entry and seating period. Recommend people to pair up with their neighbor to think about the ways they use local areas.

### **Activity 2: Mapping Sacred Places and Areas of Concern**

Break into three or four small groups for discussion and mapping of these places.

### **Activity 3: Brainstorming Opportunities**

Facilitate small group discussion and mapping of opportunities along the Black River as well as individual ranking of top constraints to taking advantage of these opportunities.

### **Sign-up for Photo Study**

### **Closing**

## **Watertown Vision Planning Workshop Questionnaire**

Thanks for coming to our Workshop! While you wait, please take a few minutes to fill out this questionnaire! No names please!

Sex: M      F

Age:

Do you work in Watertown?

Where? \_\_\_\_\_

Do you live in Watertown?

If yes, identify neighborhood. \_\_\_\_\_ -

# of School age children:

1. How did you find out about this workshop?
2. How long have you lived in Watertown?
3. How would you describe Watertown to someone who has never been here before?
4. What is your vision for the future of the Black River?
5. List two or three actions that could help to realize this vision.

SUNY ESF Center for Community Design Research

Date: 10/19/04

Project: Village of Red Creek Vision Planning

Subject: Facilitation notes for First workshop

Date of Workshop: October 19, 2004

Workshop schedule:

- 5:45 – 6:15 ESF arrival and set up at high school
- 6:15 – 6:35 Participant arrival; fill out photo survey
- 6:35 – 6:40 Introduction
- 6:40 – 7:05 Getting around and Sacred places
- 7:05 – 7:25 Concerns
- 7:25 - 7:30 Transition
- 7:30 – 7:50 Yesterday and today discussion
- 7:50 – 8:30 Brainstorming – SWOT and Exit survey

**Room set up**

- There will be up to seven large facilitated groups of eight to ten participants each. Depending on table size and configuration there will be one or two tables per group. The groups should be widely spaced if possible.
- Hang residence location map near sign in table
- Hang photo survey sheets on wall using drafting tape.

**Greeting and entry**

Procedure:

- Set up table by doors to cafeteria with sign in sheets (2), name tags, dots for residence location and photo survey packets
- Enlist help of several Revitalization committee members to greet people, help with name tags and sign in, and help find residence locations.
- ESF facilitators focus on getting participants started with photo survey.
  - Explain that they can do photo survey before the meeting starts. Each question on the survey corresponds to a board with photos on the wall. For each question they should select a photo that represents their answer and mark it with a colored dot. If none of the photos represent their answer, they can write in a response on the photo boards. On their survey response sheet, they fill in the photo number and answer the question.
  - The survey does not need to be completed in any order so if it is getting backed up, encourage people to start in the middle.
  - If participants do not finish before the meeting starts, they can complete it at the end.

Materials:

Sign in sheets                      Name tags                      colored dots      pencils  
Drafting tape                      residence location map                      photo survey sheets  
Photo survey packets (colored dots, photo survey handout)

### **Getting Around and Sacred Places (25 minutes)**

- Introduce yourself. Give each participant the packet that contains the 11x17 aerial, mapping survey, sacred places and concerns sheets.
- Ask them to take several minutes to complete the mapping survey, referencing the small aerial map. You might want to point out a few key roads and landmarks on the large scale aerial photo to help with orientation. Encourage them to work in pairs and to help each other if they have difficulty finding streets or places on the aerial.
- After five minutes move on to the sacred places activity. Briefly describe the concept of “sacred places”. Allow participants a couple of minutes to write down on the handout sheet the places they consider sacred and the reasons why.
- As a group you will map Red Creek’s sacred places. Ask for a volunteer to help locate the places and mark them with a RED dot on the large scale aerial photo. Allow participants to take turns naming sacred places. The volunteer marks them with a colored dot and consecutively numbers each dot. Write the number and the place name on the flip chart sheet. Ask if anyone else had that place listed as sacred. Write the number of people who shared the response next to the place name. Ask why this is a sacred place and record responses on the flip chart. Continue this process until all sacred places have been mapped and recorded.

#### Materials:

Handout packets      red dots      display aerial photo      easels  
Flip chart      markers      colored pencils

### **Concerns (20 minutes)**

- Briefly describe the concept of Concerns. These are issues or problems that community members are concerned about and think must be addressed. They are not confined to places or areas.
- Follow the same procedure described above. Use the same large-scale aerial photo. Mark concerns with a YELLOW dot. If a concern cannot be mapped, name it, write it on the flip chart, record the number of people that share this concern, and record the reasons why.

#### Materials:

Same as above      yellow dots