



Midpeninsula Regional
Open Space District

R-12-100
Meeting 12-33
October 10, 2012

STUDY SESSION AGENDA ITEM 1

AGENDA ITEM

Study Session to Review and Discuss the Proposed Approach for the Vision Plan Project

GENERAL MANAGER'S RECOMMENDATION

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Review, discuss and comment on the proposed approach for the Vision Plan, including the role of and perspectives to include as part of the Community Forum.

BACKGROUND

The Midpeninsula Regional Open Space District's (District's) Fiscal Year 2012-13 Action Plan includes the launching of a comprehensive open space vision planning process. This visioning process was identified as a key implementation item to help accomplish the three basic goals of the Board-approved Strategic Plan, which were deemed essential to achieve a balanced implementation of the District mission:

To acquire and preserve a regional greenbelt of open space land in perpetuity, protect and restore the natural environment, and provide opportunities for ecologically sensitive public enjoyment and education.

The three Strategic Plan goals seek to: (1) enhance regional collaboration, (2) build public support, and (3) enhance financial and staffing resources. To be effective in meeting these goals, the visioning process will need to include:

- a. Strong involvement by both traditional and nontraditional partners, agencies, and organizations that are actively involved in or have a stake in local conservation, natural resource stewardship, and recreation on the Peninsula, Coastside, and South Bay regions. Successful implementation of the Vision Plan and the overall future success of the District will depend in part on the support, both direct and indirect, of local partners, agencies, and organizations.
- b. Meaningful public involvement and participation to inspire support and excitement for the Vision Plan, for future funding requests, and ultimately for the District's future.

DISCUSSION

The Vision Plan Project (Project) intends to integrate community input obtained from extensive public outreach and engagement, with scientific information about the region, through a robust open space planning approach designed to create a shared vision that will focus and inspire joint work in the region (refer to Attachment 1 for more information on the integrated planning approach). To lead this effort, an internal District staff Project Team has been assembled to prepare a preliminary scope and schedule for the Project and seek the assistance of qualified consultant teams with expertise in public engagement and technical planning analysis. With Board approval, the following two Project Coordinators have been hired to lead two different teams to help carry out the various Project tasks (refer to Reports R-12-63 and R-12-77):

| Project Coordinator | Firm | Team |
|----------------------------|----------------------------------|--------------------|
| Jodi McGraw | Jodi McGraw Consulting | Technical Planning |
| Linda Blong | Public Dialogue Consortium (PDC) | Public Engagement |

The District Project Team and the consulting Project Coordinators will be present at the October 10 Study Session to facilitate Board discussion on the Project.

Public Engagement Approach

The proposed public engagement activities and strategies would follow the “SHEDD” Model used by our consultant, Public Dialogue Consortium (PDC). SHEDD is an acronym for: **G**etting **S**tarted, **H**earing the **V**oices, **E**nriching the conversation, **D**eliberating, and **D**eciding. This approach involves increasingly focused conversations about issues of importance to the District and the public, ultimately leading to a Vision Plan that is informed and supported by diverse communities. The components of the SHEDD model are described below.

Getting Started – Laying the groundwork for initiating public engagement. This phase involves initial conversations that help solidify internal connections, align goals, build engagement infrastructure, and identify supporters and partners.

Hearing the Voices – Establishing a Community Forum made up of partners and key stakeholders, as well as reaching out to the larger public and media; engaging the public through community conversations such as one-on-one interviews; and using technology to increase our reach.

Enriching the Conversation – Synthesizing public input received, developing selection criteria, focusing on potential projects, and framing options for deliberations.

Deliberating – Convening public meetings, focusing on high value actions, goals and projects, applying criteria to explore scenarios and assist with prioritizing, and reaching out broadly through technology

Deciding – Drafting and disseminating the draft Vision Plan for input, working with the Board and stakeholders to refine drafts, documenting processes and outcomes, holding public hearings and arriving at Board decisions

The *Getting Started* phase has already begun and involves initial conversations with the Board and District staff before the public engagement process is fully set in motion. As part of these early conversations, the Project Team has held two meetings to date with District staff, including a meeting with Skyline and Foothills field staff on September 19th and a meeting with Administrative Office staff on October 1st. Staff were asked three general questions about aspirations, how staff's responses might be similar or different from possible public response, and how these relate to the work we do at the District. Staff were also asked to brainstorm on possible partners and stakeholders to invite as part of the visioning process, as well as possible outreach activities and strategies. Staff at both meetings were engaged, energetic, and productive in generating conversations and ideas. A summary of this input as well as staff's original comments will be provided to the Board after they are fully compiled and organized.

Of particular note, one of the key concerns brought up by staff was the need to properly frame the discussions with the public, whether these take place via interviews, small focus groups, or large stakeholder meetings. In response to this particular concern, PDC prepared a short primer on public engagement and how to respond to feedback from the public that potentially falls outside the District's established mission and goals (refer to Attachment 2). In keeping with one of the engagement strategies mentioned in this document, District staff will set a framework for the discussions by providing the public with information about the District, including the mission statement and a description of the types of programs and facilities that the District provides, to establish an understanding of the core values that underlie the work and purpose of the District. Members of the public will also be encouraged to express their own personal core values to understand where there are similarities or differences between personal values and the District's established goals and mission. Staff will focus on the similarities as part of the planning process and also make note of those values that extend beyond the District's purview to explore potential, suitable partnerships or to relay the information to the appropriate agencies and organizations.

The *Getting Started* phase also includes the October 10 Board Study Session and a subsequent Board meeting in which the Board will be asked to approve the refined scope of work, the Community Forum participant list, and contract amendments to complete the remaining work, which will include the remaining phases of the "SHEDD" Model.

Outline of the October 10 Board Study Session

The Board Study Session on October 10 will provide the Board with additional information on the proposed Project approach, including an explanation of how the technical planning analysis will integrate public input and what the proposed structure for public engagement may look like. The Board will be asked to provide feedback on the goals of the Project and potential concerns based on the information provided to date. Staff will also seek Board input and direction on the role and range of representation of the Community Forum, the breadth of scope of the Communications, Engagement, and Public Participation Plan (CEPP), and suggestions on partners, stakeholders, and individuals that should be specifically invited to participate in the visioning process. The following is a more detailed outline of the various topics to be covered on October 10:

- Review of project goals and introduction of project team members
- Explanation of the proposed integrated, values-based vision planning process

- Discussion on public engagement – desired outcomes and concerns about the vision planning process
- Review role of and perspectives to include as part of the Community Forum
- Discussion on the CEPP – goals, partners and individuals to include
- Closing comments

Suggested Board Preparation for the October 10 Study Session

Given that there will be much to cover and discuss at the October 10 Study Session, staff recommends that the Board consider the following questions ahead of the meeting and bring their thoughts and ideas for discussion:

Board desired outcomes and concerns about the Vision Planning Process

- What are your greatest hopes for this process?
- What concerns do you have about the process?

Community Forum

- How do you envision the Community Forum and its relationship with the Board?
- What perspectives and interests should be represented in the group?

Background on the Community Forum for reference: The purpose of the Community Forum is to provide input to the District throughout the visioning process, aid in fostering a positive public image of the District, and help educate the public about the District itself as well as its goals and accomplishments. Ideally, Community Forum members would participate for the entire duration (1.5 years) of the Project and meet periodically, approximately every three months. Members are expected to represent a broad spectrum of the District constituency and the larger public the District serves and/or bring particular knowledge, interest, or expertise in one or more key relevant areas, such as: agriculture, business, rural communities, urban communities, education/interpretation, environment/open space, transit/access, trails/recreation, and public safety.

Communication, Engagement, & Public Participation Plan (CEPP) Initial Input

- What partners must be strategically engaged?
- What interest groups should be targeted for engagement?
- What other audiences should the CEPP target for outreach and involvement?

FISCAL IMPACT

The October 10 Study Session would not result in a direct fiscal impact. Input received at this Study Session will be used to finalize the Project and consultant scope of work, and prepare contract amendments for future Board consideration and approval. These contract amendments are expected to remain within the current Fiscal Year 2012-13 Budget.

PUBLIC NOTICE

All public noticing requirements of the Brown Act have been met. No additional notice is necessary.

CEQA COMPLIANCE

This item is not subject to the California Environmental Quality Act (CEQA).

NEXT STEPS

The Project Team will incorporate Board feedback into the planning process to finalize the Project scope of work and to prepare consultant contract amendments for Board approval. Board feedback will also guide the development of the public engagement process and the formation of the Community Forum. District staff expects to return to the Board in November for approval of the Project Coordinator contract amendments and the list of participants to invite for the Community Forum.

Attachments:

1. Description of a Coordinated Planning Process that Blends Science-Based Analysis with Broad and Deep Community Input
2. Benefits of Public Engagement and How to Respond to the Challenges

Attachment 1: Description of a Coordinated Planning Process that Blends Science-Based Analysis with Broad and Deep Community Input

The Vision Plan intends to integrate community input, obtained from extensive public outreach and engagement, with scientific information about the region, through a robust open space planning approach designed to create a shared vision that will focus and inspire a coordinated effort to further the mission of the District.

Engaging the Public

The Public Dialog Consortium (PDC) will lead the public engagement component of the Project, which will follow the “SHEDD” Model—an approach that creates opportunities for increasingly focused conversations about issues of importance. Following this model, PDC will use a series of outreach and engagement strategies to share information about the District’s work and to elicit productive input from partners and the public, leading to a vision plan that is informed and supported by diverse communities (refer to Box 1). The engagement strategies build upon one another in a snowball effect to support the development and maintenance of close partnerships while building broader networks of public involvement and participation.

Box 1: Sample Public Outreach and Engagement Strategies

- Community Forum throughout the Vision Planning process
- Aspirational interviews and small group community conversations
- Targeted media relations
- Community focused outreach
- Online discussions and polling
- Public meetings
- Text and phone based input mechanisms

Assembling Scientific Information

Jodi McGraw Consulting, under District staff direction, will lead a multidisciplinary team of experts who will integrate public input with scientific information to identify open space priorities. The planning team will compile a project geographic information system (GIS) containing spatial data illustrating the region, based on the District’s extensive database, as well as recent regional plans (refer to Box 2). In this way, the Vision Plan will build on existing knowledge and priorities to advance District and partner work to protect and manage open space.

Box 2: Existing Plans and Information

- District Master Plan
- District Regional Open Space Study
- District Strategic Plan
- Conservation Lands Network
- Bay Area Critical Linkages
- County Trails Plans
- Ridge Trail and Bay Trail Plans

Integrating Science and Community Input

Scientific information and community input will be integrated to develop the vision plan through a value-based planning process (refer to Box 3). At each step, the community will be engaged to provide input that will inform development of the plan. For example, in the first step, the public will be asked about their aspirations for the region, which will be used to identify the Vision Plan’s goals and potential projects—what the plan will achieve. Later in the process, community input will be used to develop criteria to prioritize the goals, action items, and projects. At each of these steps, the District team will present the community input to the Board to confirm how the input will be used to inform and shape the next step in the planning process.

Box 3: Planning Process

- Identify project outcomes
- Synthesize available data
- Characterize open space values
- Develop project selection criteria
- Identify, evaluate, prioritize potential projects and action items
- Prepare Vision Plan document

Attachment 2: Benefits of Public Engagement and How to Respond to the Challenges

Why engage the public? What are the benefits?

Public engagement is a practical communication process that will enable the various members of public (individuals, groups and organizations) to participate in visioning, planning, and implementing actions and decisions that affect them. Public engagement produces a number of important benefits:

- Fosters relationship building, develops partnerships, and builds trust between the District and members of the public.
- Elicits multiple perspectives, uncovers knowledge new to the District, surfaces underlying values, and increases the public's understanding of and support for District policies and programs.
- Engages the broader diversity of the public, especially people and groups who have not been engaged in the past.
- Increases public ownership and investment in the visions, actions, and decisions that are made ("people are more likely to support what they help make").
- Ensures better decisions and more successful outcomes that effectively respond to the needs and priorities of the public.
- Enables the District to better manage conflict and differences with the public; reframes public opposition into joint problem solving; engages members of the public as part of the solution.
- Builds the District's capacity and communication skills so that public engagement is an ongoing and sustainable process for the future.

How can the District respond to the challenges of public engagement?

Public engagement is not a panacea, nor is it always easy to implement. One of the key challenges for policy makers and administrative staff is learning how to respond constructively to the public when they offer suggestions and make requests and demands that cannot, for legitimate reasons, be fulfilled. There are a number of strategies for effectively managing this challenge:

Discussion Strategies: One key to effective discussions is to *establish a clear set of expectations and parameters for the public engagement process*. The public needs to know what they are being asked to do (and not do), the type of input they are expected to provide (and not provide), and how their input will be used to shape the visioning or decision making process. Transparency and clear expectations will help the public from making untenable requests or demands in the first place.

A related strategy is *public education*. In establishing the parameters of the public engagement process, policy makers and administrative staff can inform the public about their agencies' charter, mission and jurisdictional authority, what they are mandated and legally bound to do and not do. These parameters can function as a set of criteria for the types of requests and demands that are made. Again, if the public is sufficiently educated, they will be poised to provide relevant input that can be meaningfully incorporated into the planning process.

In-the-Moment Strategies: Some members of the public will still make untenable requests in spite of the best efforts to utilize the discussion strategies. In these cases, articulating expectations and parameters, and educating the public can be done in "real time," in response to an actual request as it is being made. Moreover, responding in the moment opens up possibilities for other communication techniques. One is to inquire into the request, asking what the vision and values are behind it and why it is important to the person or group. This, in turn, can surface options and alternative ways that the request can be satisfied, such as working with another agency, organization, etc. Of course, there might not be other options, in which case the District should be open in explaining why they cannot fulfill the request, in a manner such as "We understand your request. However, the District is not the right agency to address this type of request and here's why . . . Instead, let me direct you to _____ who has the relevant knowledge,

Attachment 2: Benefits of Public Engagement and How to Respond to the Challenges

working experience, staffing, etc.” By providing background context and explaining the reasons, you are not only educating the public, you are demonstrating respect and inviting the public to look at the situation from the perspective of the District.